



Providing Evidence/Proof in a Bid

The things you need to know

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What is evidence/proof?

Evidence and proof are, essentially, interchangeable words. Proof or evidence are typically offered to support the truthfulness of a proposition. For our purposes, we will continue with the word evidence but we also take this to mean proof.

Evidence is drawn from your understanding and your experience. However, for evidence to be truly compelling, and for it to convince others, it has to fulfil certain criteria and have attributes which means it becomes *strong* evidence.

We will summarise what can be offered as evidence in bids and then we will explore each in a bit more detail. We will then look at the main classifications of evidence and the general rules you should apply.

What defines evidence as being strong or weak?

Evidence generally falls into one of the following five categories, which are ranked in order of strength:

One: Empirical evidence is a way of gaining knowledge by means of direct and indirect observation or experience. Empirical evidence can be analysed quantitatively or qualitatively and although, as a concept, it has its origins in the scientific world, it is a term which can be applied to evidence supplied in bids. Empirical evidence presents indisputable conclusions when certain parameters are applied.

For example, if a client follows a series of steps which you recommend or applies processes you offer, then promised cost savings will be achieved and you provide evidence which shows how this has happened before and the process is repeatable.

Two: Evidentiary evidence is a conclusion or data which has been produced by a disinterested third party. You have had no input to the conclusions but they represent outcomes which support your proposition. Evidentiary evidence is particularly strong and should be employed wherever you have an opportunity to do so.

For example, let's presume you are one of ten companies that supply a service to the public; the people who purchase your services are interviewed by an objective consumer organisation which finds that your service is regarded as the best by a majority of the users. This is excellent evidence because you had no control over the outcome.

Three: Institutional evidence is that which is produced by your own organisation or a third party organisation which you have commissioned to act on your behalf. In this case this evidence is weaker because you are more likely to select the data which supports your assertions and ignore that which does not say what you want it to say. Despite the fact that you will not do this – a potential customer is more likely to be suspicious of your conclusions.

For example, if you were to conduct a survey of your customers, which did not produce the results you wanted (or expected), you might make the choice to ignore the survey or manipulate the statistics to more suit you. Although you wouldn't do this, there is always the chance you may have. This is why data you produce is less effective than that which is produced independently.

Four: Anecdotal evidence is that which is considered dubious and which is acceptable only in lieu of more robust evidence. Anecdotal is the bid equivalent of hearsay; in other words you cannot support what you say other than in the most broad terms and often relying on experience gained elsewhere, by other companies and other customers.

For example, you offer a new product or process, which is untried, but you support it with the outcomes experienced elsewhere by people using a similar product or service. This evidence is at arm's length from you and you are relying on their testimonial rather than your own direct experience.

Five: A truism is evidence which can be, effectively, claimed by anyone and does not really differentiate you. It is usually just a simple statement of generally accepted fact and is actually not evidence at all.

For example, if you are more efficient, you will make cost savings. Or, if you have happier staff, your staff turnover rate will improve and you will save on recruitment costs.

Your job when writing a bid is to decide which of your statements and claims will require evidence and then apply the best you have. Naturally, if your evidence falls into one of the weaker categories, then it makes sense to ask yourself if you can find better, stronger evidence to support what you are saying. Please remember that the worst thing you can do is to provide no evidence at all.

Generally, the stronger the evidence you supply, the more convinced an evaluator will be and the more likely you are to score highly.

What counts as evidence?

Evidence comes in many forms but the types which are generally most appropriate for bids are as follows:

Case studies
References
Testimonials
Supporting data
Market studies

Demonstrations
Awards
Trials/Pilots
Proof of concept
Competitor matrices

Site visits
Customer surveys
Press articles
Third party accreditations

Case studies

A case study is an analysis of a particular case or situation used as a basis for drawing conclusions in similar situations. Case studies are used in all businesses and industries to capture events and scenarios which show how a company has delivered its services or products efficiently and effectively, has coped with problems or issues or has been innovative and forward thinking. Case studies are one of the most effective forms of evidence as long as they conform to a series of specific rules.

The rules for an excellent case study are as follows:

- It should be relevant to the reader; rooted in their market and illustrative of their own challenges or environment.
- It should be recent. The older a case study becomes, the more its efficacy decays until it reaches an age where it is no longer relevant.
- It should not be anonymous, if possible. Case studies which contain the name of the company for whom the services were completed is far more effective than one which simply refers to a nameless company.
- If the case study can be substantiated (which means it can be independently checked without your intervention) then this improves its effectiveness. To achieve this, you will need to have a referee within the case study who will attest to its truth.

A good structure for a case study is as follows:



The Bid Perfect Case Study Template

Introductory notes:

- The purpose of case studies is to provide an illustrative overview of how you have approached, evaluated and resolved a problem for a client. A good case study also describes an innovative solution you have taken to enhance your delivery of products or services.
- The most powerful case studies are ones in which your potential customer can see issues they may face or with which they have an empathy.
- Please write clearly and don't use jargon. Always write as if you are explaining your methods to an intelligent but *non-industry* person.
- Don't be afraid to illustrate your case study with images, charts and data tables if appropriate.
- Money talks, so bring out cost savings as much as you can.

- Please don't just sing your own praises! Talking about the barriers you faced, and how or why an initiative may have failed to deliver, can often be just as important as perceived successes. Importantly, describe how you adjusted your process in the light of lessons learned.
- The limit should be about a 1,000 words.
- Don't repeat yourself. If one of the instructions below means repetition, ignore it.

1. Summary - 50-70 words

Three brief points to introduce the study:

1. What was the problem, challenge or objective?
2. What was your approach to this?
3. Your process for deciding on personnel and resources to be employed on the project.

2. Background to the customer - 100 words

Include specific customer details if it is relevant and you have permission. Alternatively, refer to the customer in broad generic terms e.g. *A major clearing bank* or *A large construction and civil engineering company*. Please note that a strong case study names the customer and a weaker one is anonymous. Many customers will require that you do not use their name, so this can present a challenge.

4. Who was involved?

Include who did what in the initiative - job roles and descriptions, not personal names or overly technical terms. This can be a simple bullet list.

5. The problems and how you tackled them - 400 words

List the issues your initiative sought to address, keeping to a maximum of six.

- Follow each point with an account of how you tackled the problem.
- Do focus heavily on benefits you anticipated.
- DO mention what you found difficult, and any barriers you encountered.

6. Outcomes and impact - 150 words

Ensure that there is a clear 'before and after'. The reader should not be left confused as to how your actions made a real difference. Include cost savings and process efficiency gains as well as other key benefits obtained.

Ensure key success factors are spelled out.

7. What could we have done better? - 150 words

There's a perception that case studies are often nothing more than PR exercises. So mentioning outcomes that were not as predicted and areas where you could improve will only add value to the piece.

8. Next steps - 50-100 words

A good way to round off a case study is defining what the follow-up steps are and how you intend to monitor the situation to ensure long-term efficacy of your solution.

9. Further information

Please provide the details of someone from your organisation who knows the project in question, and who can field an enquiry. Give their name, position, email address, and telephone number.

10. Key learning points - 100 words

List the three or four main things that your reader needs to take away from the case study.

References

References are always a good thing to include and you may be asked for them anyway. A reference is irrefutable evidence because it is a live customer (or perhaps a recently served customer) who is prepared to answer questions about your service performance or products. It goes without saying (but we'll say it anyway) that you should be sure your referee is **a)** willing to provide a reference before you include their name **b)** that they are willing to give the type of reference required (e.g. email, phone conversation, etc) and that **c)** the reference will be a good one!

Testimonials

Testimonials are tricky things. On the surface, they seem like great evidence and, generally, they are. The trouble with testimonials is that they *decay* in their effectiveness with the relentless march of time. The definition of a testimonial is *a written confirmation, supplied by a customer, of something you have performed well, at a given point in time*. The problem is that the further you move away from that point in time, the less likely that testimonial is to convince.

In fact, it can almost seem like living on past glories. Things happen; relationships change, customers are lost, people move on... The fact is that a testimonial only has true resonance if it is relatively recent, can be checked by the bid evaluator and is relevant to their market of requirements. If you can combine a testimonial with a live point of reference, then you have the best type of testimonial.

Supporting data and market studies

Data, reports, KPIs, financial models, etc. which support a proposition you are making in your bid are vital. If you are, for example, offering year on year cost savings over a three contract, then it makes sense to model those savings and present them as data. You might also be showing historical data to show where you have saved money for other customers, perhaps in the form of a case study. This is all excellent and there is no doubt that you will be able to show spreadsheet upon spreadsheet of working to show how you arrived at your proposition.

The trouble with a great deal of data though is that it is internally produced which means it becomes *intuitional evidence* (see Page 2) – which is one of the weaker forms of evidence. For any kind of data to have real impact, it will be best produced by an independent third party source, which will then move it into *evidentiary evidence* (refer back to page 2, again) category. People will be more inclined to trust independent statistics and reports than they will any other. Think of an independent consumer organisation, like *Which?*, for example.

If there is no way for you to support your arguments with the backing of independent data, then you have to produce your own. If this is the case then the key to making it as compelling as possible is *transparency*. If the evaluator has an opportunity to verify and substantiate, to their own satisfaction, perhaps through an audit for example, then you are adding an extra layer of validity to your internal data.

Market studies, which include various forms of surveys and customer satisfaction assessments, are subject to the same general rule; if you have produced the results the impact is lessened than if carried out by an independent third party.

Under any circumstances, supporting data is a good thing. But adding a way for it to be verified by a potential client is your way of making it memorable.

Demonstrations – Trials/Pilots – Proof of Concept

If you are selling a product or a service which can be demonstrated in advance or set up for the client to experience what they will get from you, then this should be offered in your bid. It should be a seamless, non-disruptive and cost neutral exercise which proves to the client the efficacy or validity of your solution.

Of equal importance is that the experience for the client can be had without you around. In other words they can be free to play around, put whatever it is through its paces, make it work their way and let them see how good it is. If you are prepared to give something away for nothing and demonstrate your confidence in something, this adds to your bid. Also, if your offering is more conceptual than product based, then coming up with a novel and innovative way of a ‘free go’ will work well.

Awards

Awards are important. They demonstrate that, at a given point in time, you have delivered at an exceptional level and been the best at what you do. Or, more accurately, better than those against whom you were competing for the award. This means that the smaller the field of potential awardees, the less impressive your award is. The impact of an award is also lessened or increased dependent upon who made the award.

The best types of award, when intended as evidence should be:

Recent; a ten year old award for something could be a nostalgic reminder of how good things used to be. In the eighties, the Baker's Arms pub near Wareham in Dorset won Pub of the Year and they proudly hung a shiny new banner outside to let everyone know of their fully justified pride. Eight years later, that banner was still hanging there (just) although very tattered and somewhat grubby. The pub itself had gone downhill a bit and was certainly not a candidate for Pub of the Year anymore. Beware of awards long past their sell by date.

Relevant; if you are trying to sell something which depends upon customer service excellence then an award for having a great website means little. An award you have received should be cited when it advances your business case and provides indisputable evidence of your claims.


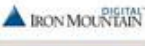




Third party given; an award for excellence given internally from, for example, management to a team is a nice thought but, ultimately means very little. This is because there are no really objective judgement criteria. In a bid situation, you are being compared against other competitive organisations, so an internal award does not provide evidence of your abilities when compared to other companies. An excellent award is one given by a third party who is independent, respected and objective. They have weighed and measured you against other organisations in your field and judged you to be the best.

Ultimately an award must make the evaluator sit up and take notice. Put yourself in their position and ask yourself, *would this impress me?*

Competitor Matrices

A competitor matrix is a tool for comparing you to other organisations which are similar to yours. The point of them is to show you where you rank. As with most of the previous types of evidence we have discussed, matrices produced by objective third parties are the best.

A typical matrix might look like this:

	 Alexander IT	 IRON MOUNTAIN Connected® Backup/PC	 mozy	 CARBONITE	 Backup Exec	 Norton from symantec
Computer Operating Systems	Windows * 7, Vista, XP (32 & 64 bit) Server 2008,2003 (Mac Q1 11)	Windows * 7, Vista, XP (32/64 bit) Server 2008/03 Mac OS X	Windows * 7, Vista, XP (32/64 bit) Server 2008/03 Mac OS X	Windows * 7, Vista, XP (32/64 bit) Server 2008/03	Windows * 7,Vista,XP (32/64 bit) Server 2008/03/00	Windows * 7,Vista,XP Mac Os 10.5
Data De-Duplication level	Global Block Level	File Level	Private Key De-duplication	✗	NetBackup (optional)	File Level
File Versioning	Unlimited	10 Versions	30 Days	12 Versions/ 90 Days	✗	✗
Archive (Retention)	Unlimited	90 days	30 Days	30 Days	✓	✗
Bandwidth & CPU Throttling	✓	✗	✓ No CPU Throttling	✗	✓ No CPU Throttling	✓ No CPU Throttling
Central Administration Console	✓	✓	✓	✓	✓	✓
Restore from Web Browser	✓	✓	✓	✓	✓	✓
VSS support (Open File)	✓	✓	✓	✗	✓	✓
Private and/or Corporate Key Encryption	✓	✓ No Corporate Keys	✓	✓ Managed Key Default	✓ No Corporate Keys	✓ No Corporate Keys
Offsite Data Replication	✓	✓	✗	✗	✓ Additional Service	✗
Unlimited Scalability	✓	✗	✗	✗	✗	✗
Available as "Private Cloud" Solution	✓	✓	✗	✗	✓	✗
External USB or e-SATA Drive Support	✓	✗	✓ Only Mapped Drives	✓ NTFS only	✓	✓ Only Mapped Drives
Laptop Client price per month (US List) Server Client price per Gigabyte	\$7/month for PCs \$5.50/GB for servers Block server plans avail.	\$14.95/month for PCs \$4/GB for servers	50 GB, \$6/Month 125 GB, \$10/Month \$7/Month Server License + \$5.50/GB	Tiered Storage Pricing \$20-\$500 up to 500gb	Various License Model	\$4.16 /month 25gb Maximum per Account

If the above matrix was produced by an independent source (which, in this case it was) then it will carry resonance and make sense to the evaluator. This is, of course, if it shows you as having clear competitive advantages. The more obvious advantage for you is that it is free compelling evidence because someone else has done the work and then given you an endorsement which can be checked independently by an evaluator. This is someone else saying you are better than your competition.

Site Visits

Here at Bid Perfect, we love a good site visit – especially if they are unaccompanied or based on a mystery shopper concept.

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If your service or product lends itself to a site visit for the prospective client, then the best types are those where you have the confidence to say: *'Here is where we are operating the service, please feel free to turn up any time and take a look. You can call unannounced and we will make sure someone is available to answer any questions you have.'*

Naturally, there may be times when this is impractical, due to health and safety or security issues for example. However, the freer someone feels and the less directed when making a site visit – the more they see your confidence in what you do.

There is an old joke that the Queen thinks the world smells of fresh paint. This makes the point very succinctly and there is nothing else to say!

Third party professional accreditations

Accreditations you have had to earn, to work for, to be audited for, to be judged for are the best. There are two types of accreditation; the certifications awarded to a corporate entity and the achievements of the individual. Both are of equal importance in a bid.

1. **Corporate Accreditations.** The most obvious examples that are achieved by an organisation are accreditations for quality, environmental competence, process and product quality which have been awarded by respected public and professional bodies. Corporate accreditations break down further into two distinct sub-groups:
 - Earned accreditations, which are judged by professional institutions and are awarded against a generally recognised national or international set of standards or values. Typical examples in the UK are the British Standards Institute (BSI), the Health & Safety Executive (HSE) or the Environment Agency.
 - Paid for accreditations, which can be awarded to any organisation which stumps up the cash. Typically, this may include such organisations as the Federation of Small Businesses or belonging to the local Chamber of Commerce. While these types of enrolments may be useful to your business, the evaluator will probably deem them worthless in telling him/her about your levels of quality.
2. **Personal accreditation** is that which is presented at a personal level to individuals, which, in a bid, is very useful for giving the evaluator reassurance that their account or contract will be managed by proficient and well trained people. There are three general types of personal certification. Listed in order of development level and portability, they are: corporate (internal), product-specific, and profession-wide.
 - Corporate, or internal certifications, are made by a corporation or organisation for internal purposes. For example, a corporation might require a one-day training course for all sales personnel, after which they receive a certificate. While this certificate has limited portability – to other corporations, for example – it is the most simple to develop.

- Product-specific certifications are more involved, and are intended to be referenced to a product across all applications. This approach is very prevalent in the information technology (IT) industry, where personnel are certified on a version of software or hardware. This type of certification is portable across locations (for example, different corporations that use that software), but not across other products.
- The most general type of certification is profession-wide. In order to apply professional standards, increase the level of practice, and protect the public, a professional organisation might establish a certification. A typical example is The Association of Chartered Certified Accountants (ACCA).

The main requirement of an accreditation is that it tells a bid evaluator that your company or your people are competent to carry out a specific role and that you have been professionally judged to be of an acceptable standard.

As with all the previous evidence, it is clear that accreditation presented by an independent third party is the most compelling.

Press articles

This is simple. If you are going to include a press article in your bid, as evidence of a claim you are making, then it must adhere to the following rules:

A recently written article is (as ever) the best. An older article is useful if it describes things that are relevant at the time of the bid.

The article should be independent and in a respected or widely-read publication.

The article should be un-paid for and not linked to advertising you have paid for (often referred to as an 'advertorial'; i.e. an advert dressed up as sincere journalism).

You should not be quoting from paid-for PR or your own press releases, for obvious reasons.

Press articles are good evidence as long as they meet the overriding need which is applicable to all the evidence discussed in this document – does it advance the business case and does it support the claim I am making?

Summary

Evidence is crucial to any bid. The better the evidence, the more likely you are to be believed. If you are presenting believable evidence, then you are composing a compelling bid.

The summary for the general rules of presenting evidence in a bid are as follows:

Make the evidence you provide:

- As **relevant** as you can – to the bid, the client and the service

- As **recent** as possible
- Back up all your major (and if possible your minor) claims
- Can be **doubly substantiated** if required (i.e. the client can check without your intervention)

Keep in mind:

- Third party evidence is usually always the most compelling (empirical or evidentiary)
- Spend as much time crafting your proof as you do on any other element of the bid

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