

# The EXA Consulting Group

DELIVERING BUSINESS VALUE



**Win Themes**

# What is a Win Theme?

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- ▶ **A value statement presented from the customer's perspective**
  - ▶ Simple
  - ▶ Clearly stated
  - ▶ From the customer's point of view
  - ▶ Reinforces the customer's values and needs
- ▶ **Simple, consistent, persuasive**
  - ▶ Repeated throughout the proposal document
  - ▶ Connects technical content to customer value
- ▶ **A subtle nudging of the evaluator's perception of your proposal's value**
  - ▶ Framing how the proposed value is presented to the evaluator
  - ▶ Influence how the evaluator perceives the value of your solution to their needs
- ▶ **Answers the “so what” question**
- ▶ **Helps the evaluator realize you truly understand and will advocate for your client's needs**

# A Win Theme is Not a Sales Pitch



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## Sales Pitch

- ▶ This is the fastest helicopter with the longest range.

## Win Theme

- ▶ RCAF SAR Techs will arrive at a distress site sooner, and loiter on-station longer, than with any other proposed solution.  
Canada's Search and Rescue operations will save more lives.

# Canada vs. USA

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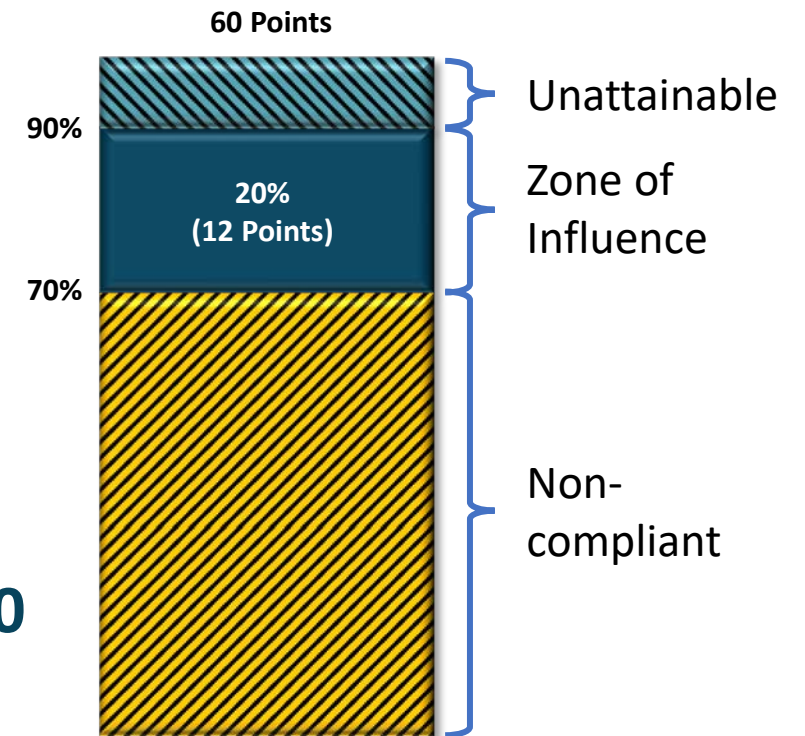
- ▶ **A great deal of win theme information comes from the USA**
  - ▶ Win themes play a very different role in USA proposals
  - ▶ In the USA, win themes can be used to circumvent the evaluation criteria
  - ▶ The goal of USA win themes is often to score well despite the evaluation criteria
- ▶ **In Canada, win themes have a much more subtle impact**
  - ▶ Unlike the USA, Canadian procurement law prohibits the circumvention of the evaluation criteria
  - ▶ Win themes must operate within the evaluation criteria
  - ▶ The goal of Canadian win themes is to score well because of the evaluation criteria
- ▶ **USA style win themes applied to a Canadian bid sound condescending and irrelevant**



# The Truth about Evaluations

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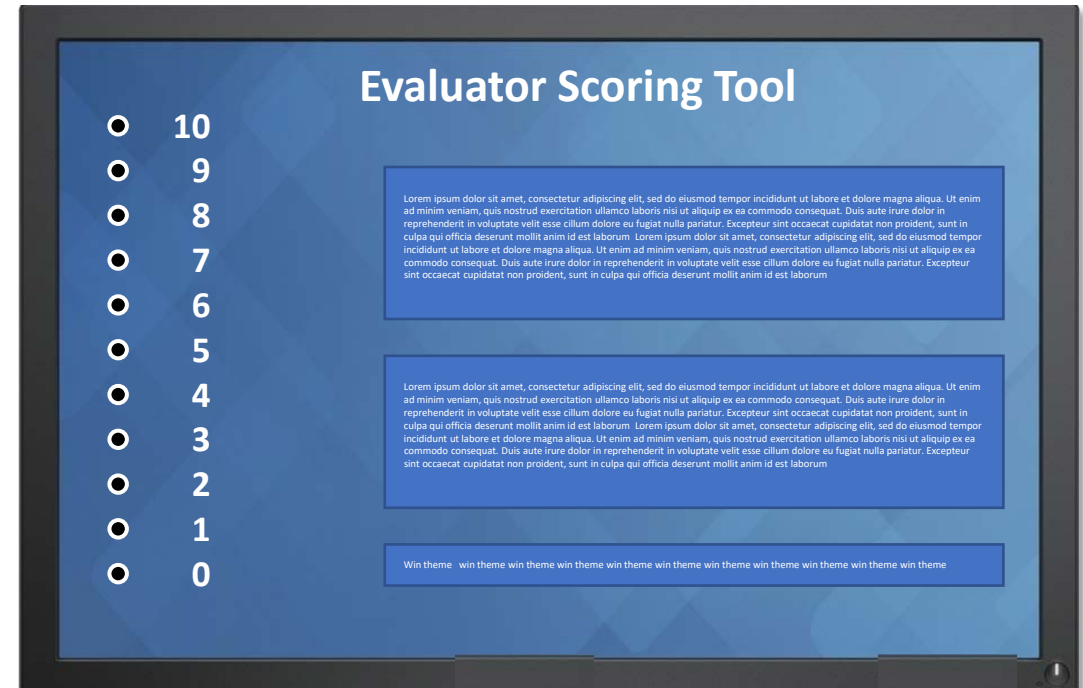
- ▶ **When RFPs say the technical score is worth 70% of the evaluation**
  - ▶ The truth is the technical score is really worth about 12% of the evaluation
- ▶ **The true weight of the technical score is how much leverage, or influence, you can exert over your competitors to earn a superior score**
  - ▶ 20% of 60% = 12%
- ▶ **Increasing your technical score by 1 is not 1 / 60**
  - ▶ It is 1 / 12
- ▶ **Every technical point is critical**



# The Psychology of Win Themes

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- ▶ **When an evaluator must choose what score to award in response to a specific criterion**
  - ▶ The win theme nudges the evaluator to round up, not down
- ▶ **The win theme gives the evaluator an incentive to add points to the bidder**
  - ▶ As opposed to wanting to take points away from the bidder
- ▶ **Nobody likes to be sold something**
  - ▶ But everyone wants to believe they make wise purchasing decisions
- ▶ **Win Themes help evaluators feel they made a wise decision by selecting your solution**

A screenshot of a digital interface titled "Evaluator Scoring Tool". On the left, there is a vertical list of scores from 10 down to 0, each preceded by a radio button. To the right of the scores are two text boxes containing placeholder text (Lorem ipsum). At the bottom, there is a text box containing the phrase "Win theme" repeated multiple times. The interface is set against a dark blue background with a subtle geometric pattern.

**Evaluator Scoring Tool**

○ 10  
○ 9  
○ 8  
○ 7  
○ 6  
○ 5  
○ 4  
○ 3  
○ 2  
○ 1  
○ 0

Win theme win theme win theme win theme win theme win theme win theme win theme win theme win theme

# The Win Theme Ladder

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## ► Product Feature

- Any characteristic of your proposed product or service

## ► Company Advantage

- A **Product Feature** that is aligned to your corporate goals

## ► Client Benefit

- A **Company Advantage** that the client will perceive as a benefit to their position or operations

## ► Market Discriminator

- A **Client Benefit** that uniquely positions your offer among all competitors

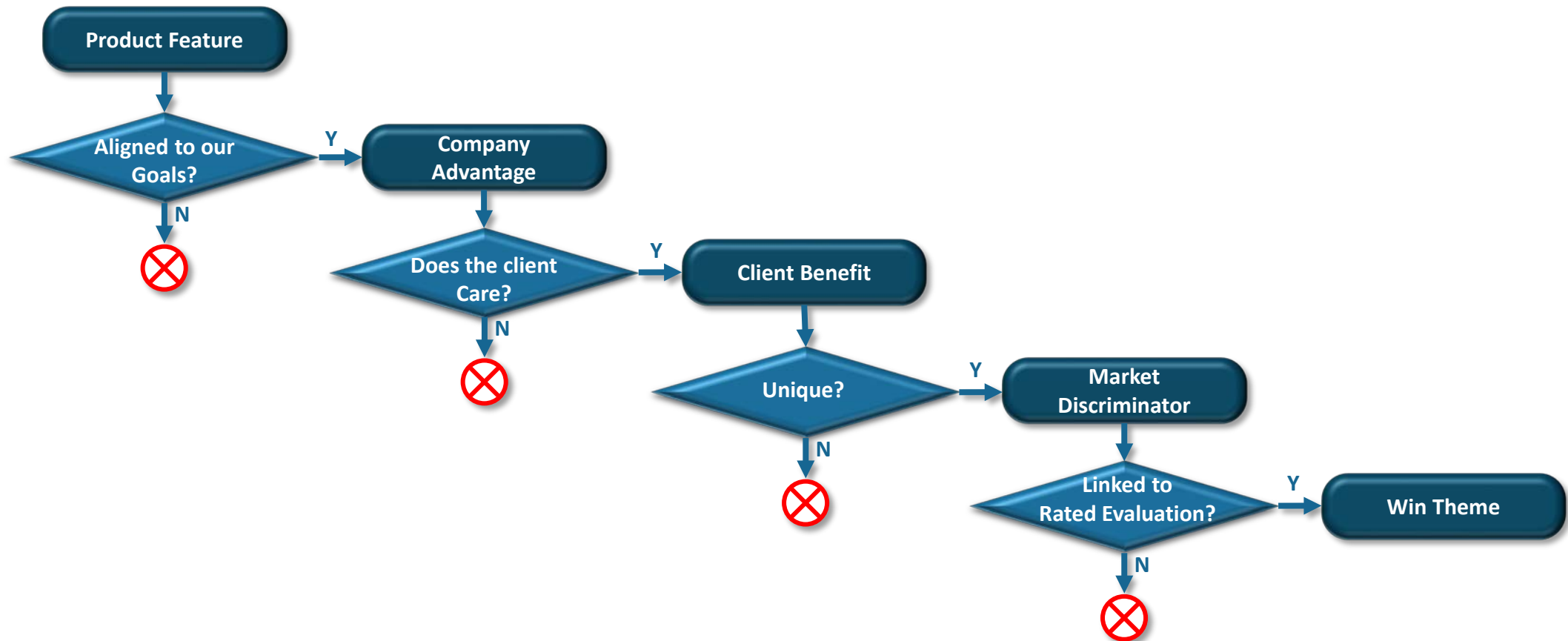
## ► Opportunity Win Them

- A **Market Discriminator** that is reflected in the rated technical evaluation criteria



# Win Theme Decision Tree

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# The VENU Win Theme Test

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**You must apply the VENU Test to every win theme**

▶ **Verifiable**

- ▶ Must be substantiated in measurable facts

▶ **Evaluated**

- ▶ Must relate to a RATED evaluation criteria
  - ▶ Never against a mandatory criteria unless there is a companion rated criteria

▶ **Not cost or ITB/VP related**

- ▶ Technical evaluation only
  - ▶ But ITB/VP and cost can influence the selected technical solution

▶ **Unique**

- ▶ Must uniquely position your proposed solution among your competitors

**There are a few specific cases when you can adjust the VENU Test:**

- ▶ When you have hard intelligence about the performance of an incumbent you are attempting to dislodge
- ▶ When there is a negative perception (valid or otherwise) of your company's performance as the incumbent

# Win Theme Inputs

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## ► Win Strategy

- The corporate approach to market positioning, teaming, pricing, resources, offsets, R&D, and investments

## ► CONOPS

- Concept of operations describing how you will implement the proposed solution

## ► Technical Solution

- The proposed technical and management approach, processes, services, and deliverables that will provide the work defined in the RFP Statement of Work

## ► Competitive Assessment

- Awareness of the client's unspoken needs
- Awareness of competitors' proposed solutions

## ► Scenarios

- A walk-through of selected trigger events and the sequences of operations your proposed solution will adopt in response

## ► Evaluation Criteria

- The evaluation criteria published in the RFP



# Win Theme Development Process



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## ► Collect

- Gather a pile of features and advantages

## ► Discuss

- Review concepts of operations (CONOPS) and scenarios to understand how and why the client would perceive advantages as benefits
- This discussion typically involves people from the solution development, marketing, and capture & proposal

## ► Analyze

- Which benefits pass the VENU test?

## ► Refine

- Which market discriminators best support our bid?

## ► Decide

- Choose 3 win themes

## ► Document

- Write the win theme statements that you will use in the proposal
- Write an executive summary that captures the win theme statements

## ► Distribute

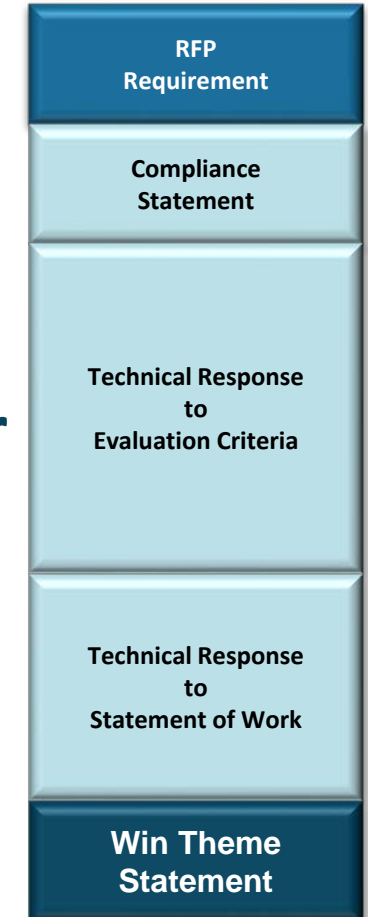
- Make everyone on the team aware of the win themes and executive summary

# Using Win Themes in the Proposal



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- ▶ The Win Theme Statement appears at the end of each evaluated section of the technical proposal
- ▶ Upon reading the detailed technical response, the evaluator next reads the Win Theme Statement
- ▶ The Win Theme Statement is the last thing the evaluator reads before scoring the response
- ▶ The Win Theme Statement prompts the evaluator to say:
  - ▶ This is why I care
  - ▶ This is how my organization will benefit from this solution
  - ▶ This is why I want to select this bidder



# Win Theme Best Practices

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- ▶ **Take the time and effort to carefully select appropriate win themes**
  - ▶ Poor win themes can be more destructive than no win themes at all
- ▶ **Limit each proposal to 3 win themes**
  - ▶ Psychological studies show the average person can remember and effectively integrate only 3 or 4 pieces of information at one time
- ▶ **Be consistent throughout the entire proposal**
  - ▶ Do not stray from, or improvise upon, the win theme messages
  - ▶ To avoid repetition, you can restate the same message using a different phraseology, but be careful not to dilute or alter the message
- ▶ **Restrict the win theme messaging to the end of each section**
  - ▶ Do not try to inject “sales pitch” into dry technical content





# Questions



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