Beyond Win Rate

Measuring What Matters

Congratulations!

From: Doe, John
Sent: Thursday, September 18, 2025 11:00 AM
To: Conlon, Kata
Subject: Project Award of New Business

Dear Kata,

Congratulations! Your organization has been selected to provide services to ABC Company in 2025.

We look forward to working with you on this project.

Sincerely,
ABC Company

Welcome.

Kata Conlon
Senior Director, Proposal and Bid Management

Explore ways to measure and communicate the value of the proposal team beyond just the win rate.

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Metrics tell stories.

They show where we excel, where we need improvement, and how we contribute to business outcomes.

If we don't measure, we don't tell our story.

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Win rate is common but not comprehensive.

Use it as a baseline and always celebrate when you win.

Win rates can be based on the number of opportunities and available contract value.

What is a win?

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Track when proposals make it past the initial cut.

It's a strong early indicator of success.

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Disengaged Rate

Not Won
Not Lost
Disengaged
Disqualified

What about those where the client pulls or postpones? Did you start working and then decline to bid?

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Track RFPs, RFIs, RFQs, task orders, change orders, surveys, etc.

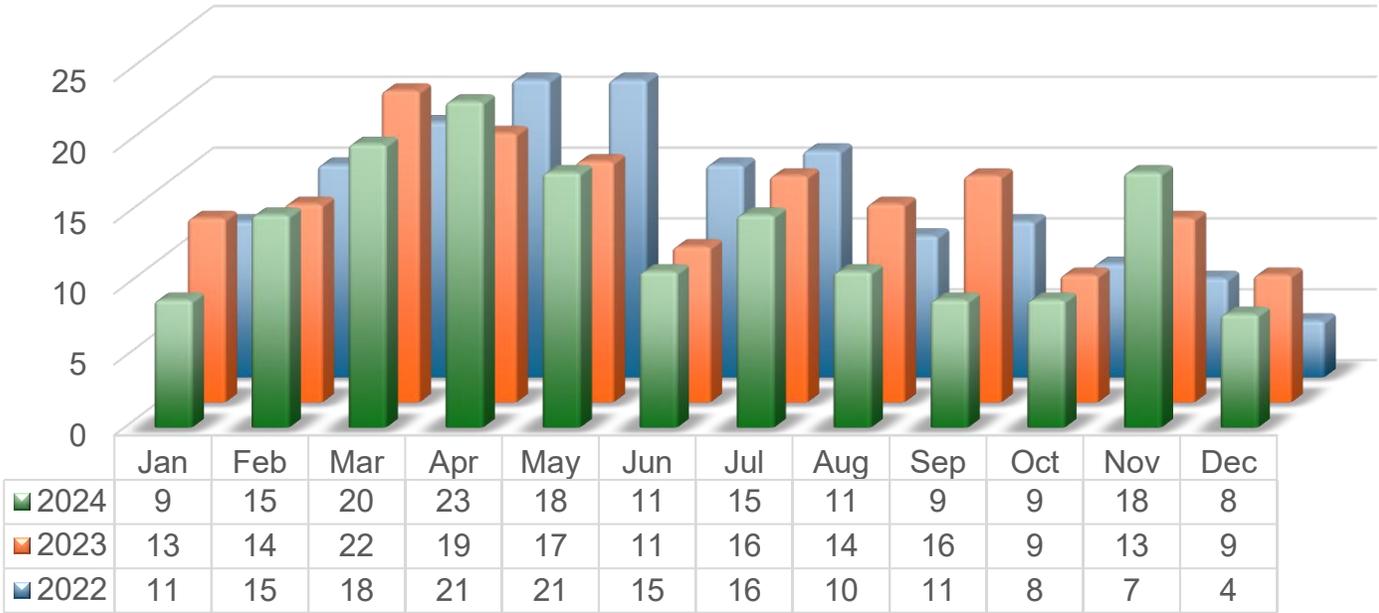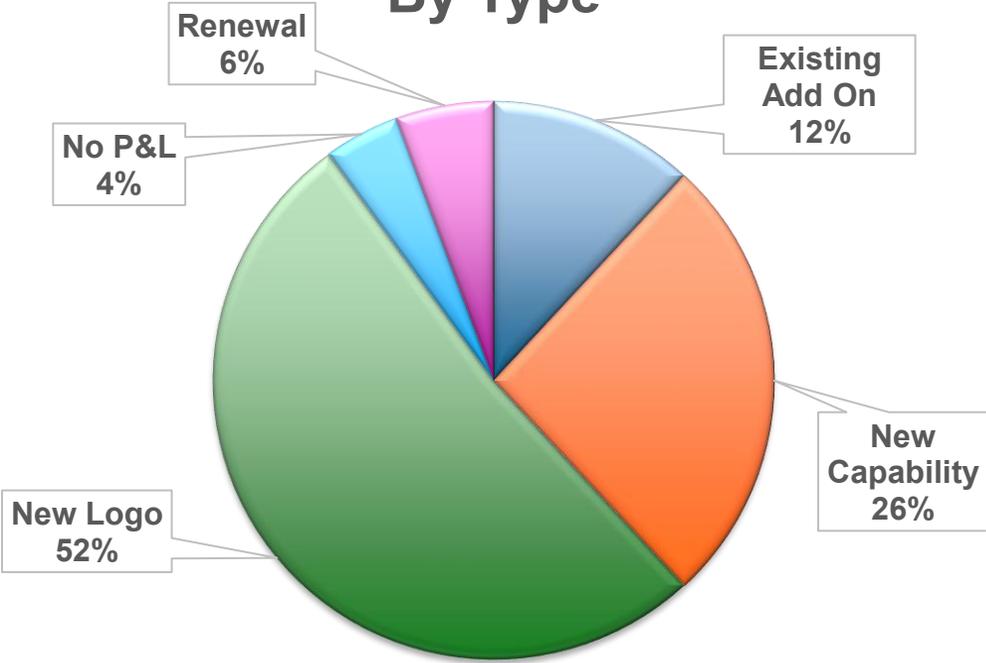Volume helps contextualize workload and capacity.

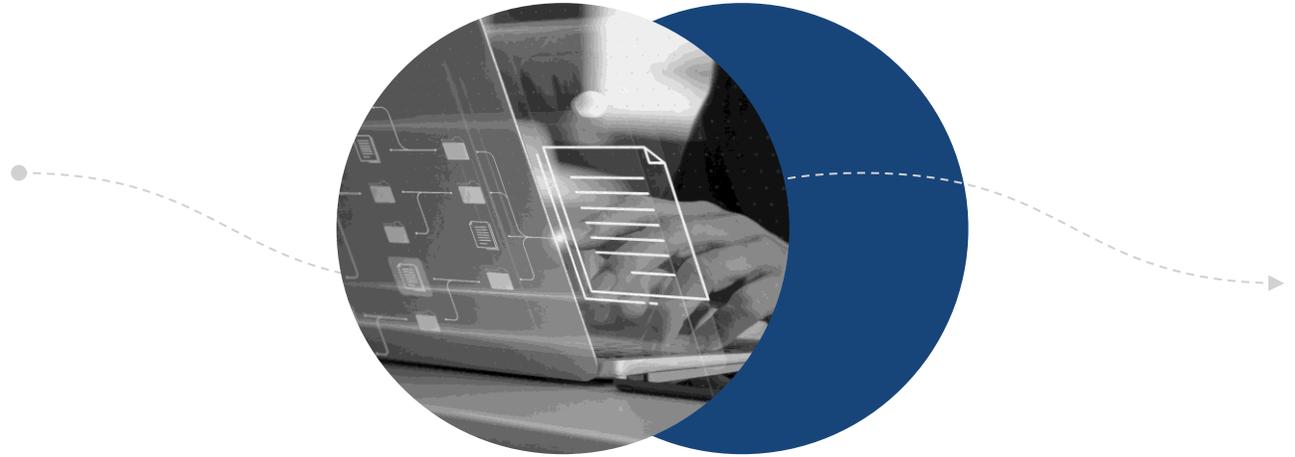WRC2025

Volume & Types of Proposals

Projects Received

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2024	9	15	20	23	18	11	15	11	9	9	18	8
2023	13	14	22	19	17	11	16	14	16	9	13	9
2022	11	15	18	21	21	15	16	10	11	8	7	4

By Type

- Renewal 6%
- Existing Add On 12%
- No P&L 4%
- New Capability 26%
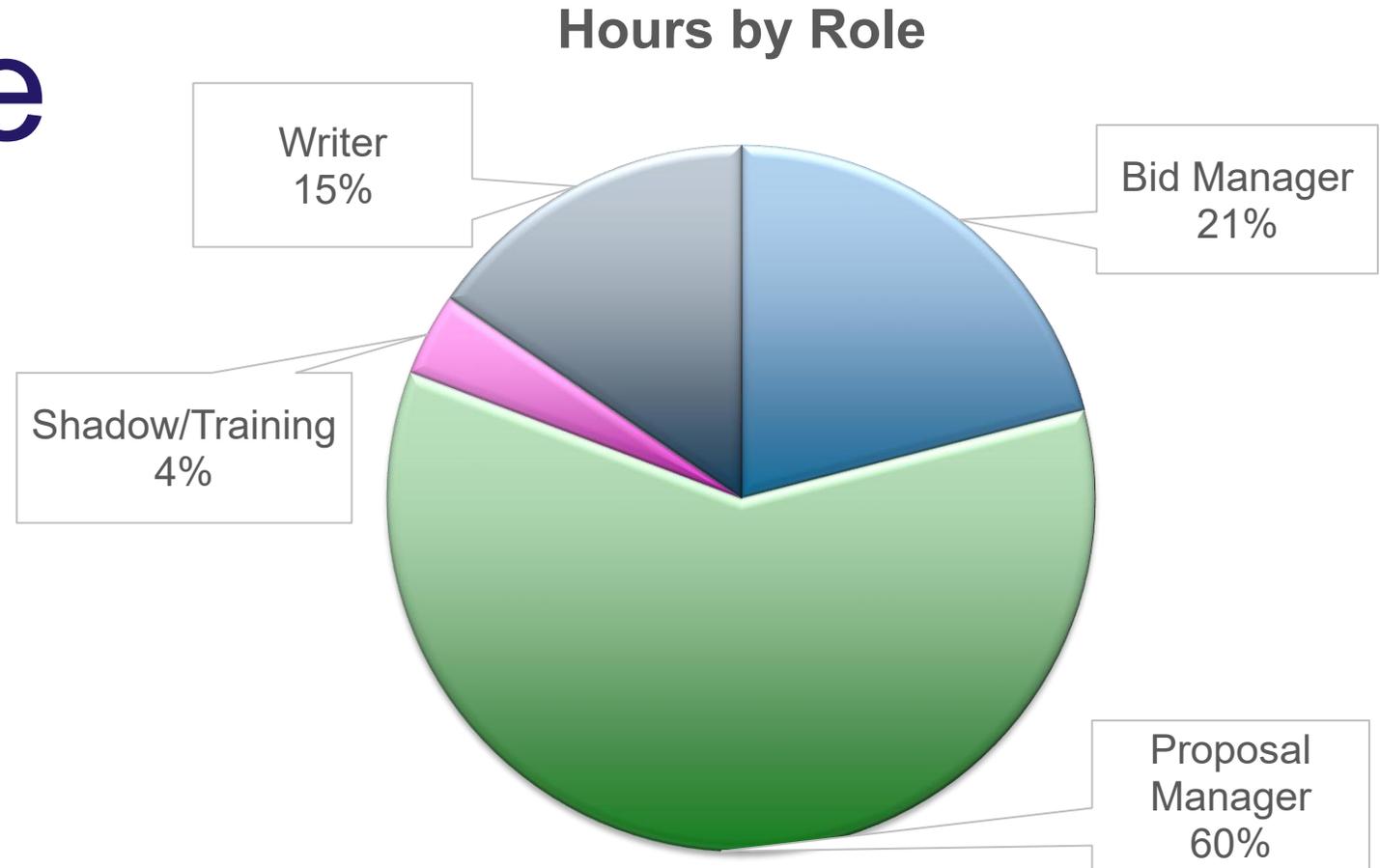- New Logo 52%

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Track time, labor, and resources

Helps justify investments and shows the true cost of pursuing opportunities.

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Cost of Preparation
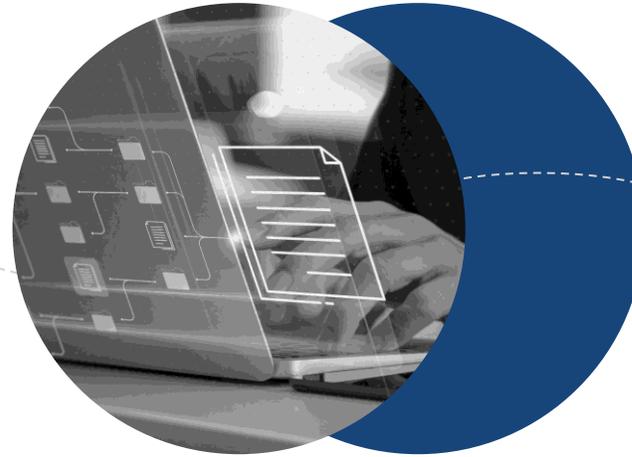
Know where your time is spent.

Hours by Role

- Writer 15%
- Bid Manager 21%
- Shadow/Training 4%
- Proposal Manager 60%

We're Full!

Demonstrate individual and team capacity.

Allows insight into resource allocation and availability.

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Complexity and Efficiencies

Sample Factors	Weight	Score
Number of Pages	#	Calc
Number of Requirements	#	Calc
Number of Questions	#	Calc
Contract Redlines Required	Y/N	Calc
Technical Questionnaire	Y/N	Calc
Pricing Complexity	1-5	Calc
Set Solution	Y/N	Calc
Real Estate	Y/N	Calc
Hard Copy Required	Y/N	Calc
Graphics Required	Y/N	Calc
Whatever!	??	Calc
Total Score		Range 1 - 5

Avg Hours/Complexity

Complexity	Avg Hours 23	Avg Hours 24	Avg Hours 25
1	47	37	146
2	56	37	30
3	82	72	54
4	119	96	88
5	186	147	110

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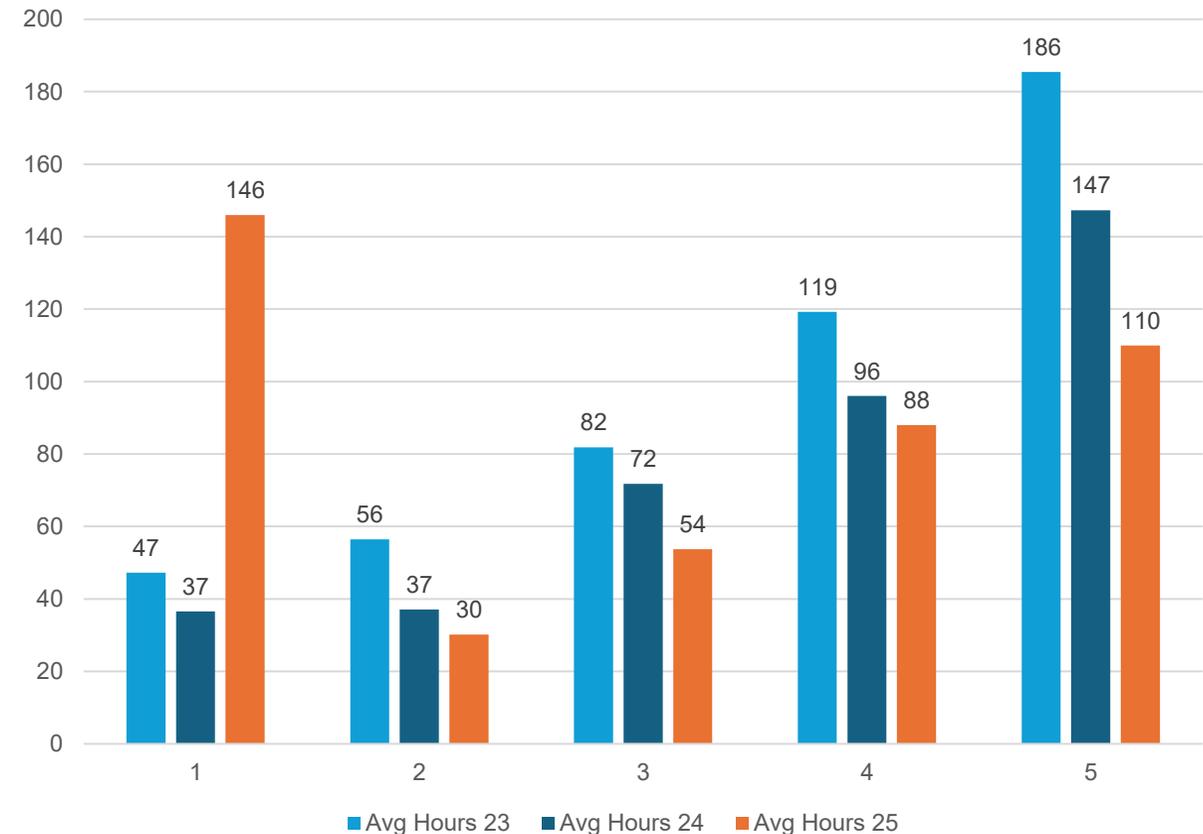
Capacity Planning

Ability
Availability
Agility

Proposal Manager	Volume	Score
Mickey	3	6
Minnie	3	10
Donald	2	4
Daisy	2	10
Goofy	2	10
Pluto	2	8
Luke	1	2
Lea	3	10
Darth	3	10
Total	20	70

Proposal Team Capacity		
	Count	Score
Max	20	70
Actual	15	75
Capacity	75%	107%

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Capacity Reporting

Trend
Share
Adjust

Capacity

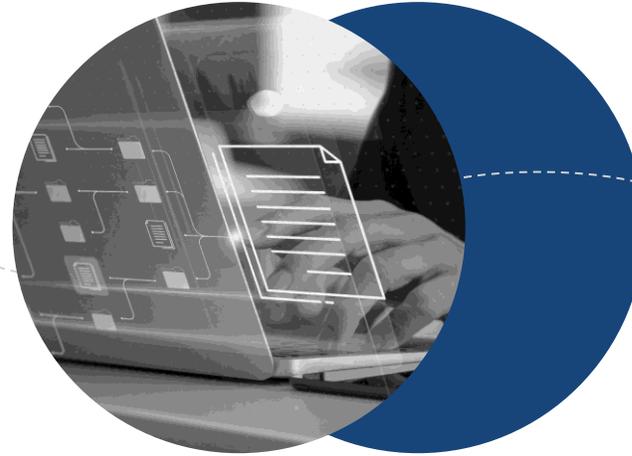| Date	Volume	Complexity
6-May	118%	90%
13-May	86%	104%
20-May	118%	90%
27-May	105%	81%
3-Jun	118%	90%
10-Jun	105%	114%
17-Jun	160%	115%
24-Jun	133%	96%
1-Jul	127%	90%
8-Jul	100%	71%
15-Jul	107%	71%
22-Jul	113%	73%
29-Jul	87%	65%

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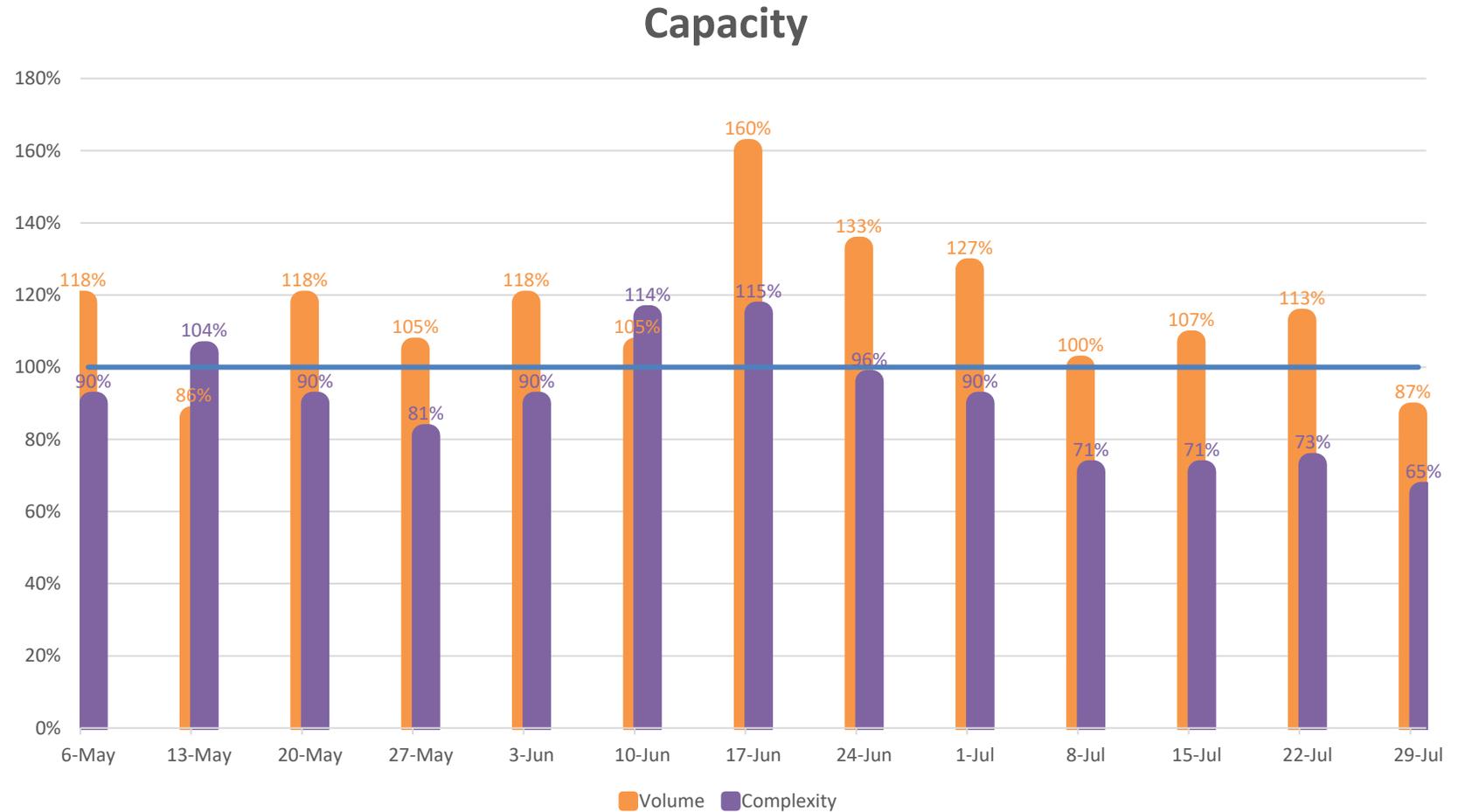
Are we faster? Are we reusing content?

Efficiency paired with quality is a key value metric.

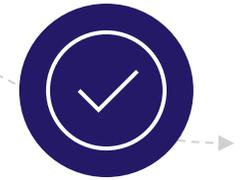**Incorporation of GenAI.**

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Reusable content management

Standardized, vetted content improves efficiencies, reduces errors, and demonstrates competence.

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Compliance.
Did we cover everything?
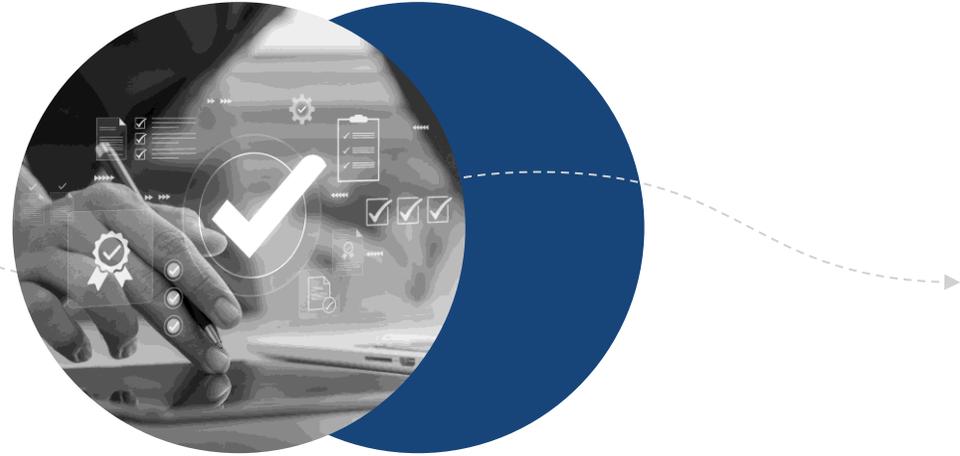
Variations and escalations.

How many times did we make exceptions?

Did we meet every deadline?

Post-submission feedback

Sales and customer scoring and outcomes. More than a debrief.

Internal customer feedback.

How'd we do?

Published Evaluation Criteria

CATEGORY / CRITERIA	PROPOSAL CATEGORY	POINTS
1	Offeror's Financial Stability	Pass/Fail
2	Offeror Qualifications and Experience	100
3	Approach to PBM and Drug Rebate Program Operations	150
4	Approach to FA Operations	150
5	Approach to Administrative Tasks	175
6	Approach to Project Staffing	75
7	Approach to Work Plan and Schedule	50
	Total Technical Proposal Possible Score	700

Offeror's proposals will be evaluated and weighed by the Source Evaluation Board according to the following criteria and subsequent point system:

Technical Capabilities	0-30 Points
Methodology/Planning Approach	0-40 Points
Price:	0-30 Points
Total Possible Points	100 Points
	(Best possible score)

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Customer Satisfaction

What do our people think?

Were we professional? Knowledgeable? Timely? Accurate?

Proposal Management

- 300 surveys sent
- 75 responses
- 25% response rate

4.83

Average Rating

★ ★ ★ ★ ★

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Tools & Resources for Tracking

Powerful tools

Excel, Salesforce, and SharePoint

Automation and analytics

Proposal software like Loopio, Rohan, Visible Thread and Qvidian

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Identifying What to Track

Align
with organizational priorities

Track
individual and team metrics

Customize
for your environment

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Reporting & Communicating Value

Use
dashboards and visuals.

Explain
what metrics mean.

Cadence
of reporting and distribution.

Advocate
for resources and
celebrate wins.

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Conclusion

Show them your value!

You can't report what you don't measure.

Start small, track consistently, and evolve your metrics.

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Thank You

Questions?

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