



# An Intelligent Strategy

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# How to develop a winning strategy for competitive bids

- **Partnering**
- **Proposals**
- **Persistence**

Perhaps the most critical success factors:

- Strategic partnering and competitive intelligence – to be discussed by Laura Dorling
- Effective proposals and follow-up
- Hard-headed persistence



# PRE-PROPOSAL

- Review Country Strategies & Project Documents
- Frequent and careful review of most promising projects:
  - Sign up for RSS on IDB Procurement Portal
  - Check IDB Web-site for new projects ▶ Press Releases
  - Subscription to UN Development Business
  - Local newspapers (for National Competitive Bidding)
- Identify your niche – understand the project cycle
  - Individual consultant/Small company: small contracts, feasibility studies, pre-Board approval opportunities
  - Large company: Compete on large projects, international competitive bids
- Invest in language capability and local content: essential tool, proof of commitment

# WINNING CONTRACTS



- Personal contact: make and maintain
  - Meet with investment officers / country coordinators for project info and feasibility studies
  - Use Business Seminar opportunities to meet people
  - Visit IDB Country Office – esp important after re-organization!
  - Meet with country government officials!!!
  - Meet with Embassy commercial staff
- Make alliances with local partners
  - Acquire local knowledge
  - Identify good local partners
  - Legal assistance, language skills etc
- Know (or join!) your competition

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# PROPOSAL

- **Key for success: Technical Proposal**
  - Clarify that you understand the country
  - Clarify your knowledge of IDB operational policies and strategies – including previous experience in LAC
  - Meet with government officials and in-country IDB staff to identify exact needs
  - Get perspective from other international organizations i.e. World Bank, USAID, NGOs, other foreign donors



# PROPOSAL

- Present attractive presentations - spend time in preparation
- Avoid silly mistakes – read and re-read (no typos, no cut and paste from other proposals)
- Tie technical approach to firm’s capabilities and proposed staff
- Follow Terms of Reference to the “T”
- Present detailed work plans – ideally with time-lines, illustrations etc
- Present a balanced team – match “expensive” foreign staff with “cheap” local consultants and assistants
- Present realistic budgets – with clear per hour rates for additional time



Belize



Costa Rica



El Salvador



Guatemala



Honduras



Mexico



Nicaragua



Panama

# PROPOSAL



## Understand the project:

- Identify key issues that might come up, concentrating efforts on important aspects – technical, environmental, political
- Explain in bid your “additionality” to the project
- Explain how you adhere to best practices
- Emphasize social/safety aspects



# PROPOSAL

- Present understanding of country and its reality, including legislation, accounting practices. Network!
- Identify local presence
  - Joint venture
  - Sub-contract consultants
  - Lawyer
  - Accounting firm
- Knowledge of appropriate IDB Policies, Strategies  
Loans and Procurement rules



# Technical Proposal - *possible format*

- The Cover
- Section A – Submission Letter
- Section B – The Firm's References
- Section C – Comments and Suggestions on TOR
- Section D – Methodology and Work Plan
- Section E – The Team and Tasks Assigned
- Section F – Curricula Vitae of Team Members
- Section G – Time Schedule: Team Members
- Section H – Project (Work) Schedule



# LOGICAL FRAMEWORK

- ‘*LogFrame*’ is now the global project planning tool of choice
- Facilitates work plan and methodology
- IDB offers an on-line training session on learning how to build a logical framework
- Go to: [www.iadb.org/int/rtc/ecourses/](http://www.iadb.org/int/rtc/ecourses/)

# ON-GOING PROJECT



- Research and apply best practices
- Meet with client on a regular basis – maintain good relationships
- Be flexible when asked to make changes to the work plan
- Share un-edited drafts with client staff



# ON-GOING PROJECT

- Submit reports on time and alert well in advance of possible delays
- Request feedback if not given
- Make frequent presentations – in-country, at the IDB (Brown Bag), general conferences
- Network!



# PROJECT FOLLOW-UP

- Offer additional presentations
- Offer to publish papers with client about the project
- Be persistent –
  - Keep contact with client after the contract ends
  - Email and follow up with phone calls
  - Don't give up or get upset if calls are not returned immediately
  - Always keep pleasant demeanor (no one wants to work with a “difficult” consultant)

# Be “IDB-Friendly”



## The Value of Flexibility, Adaptability and Trustworthiness:

- \* Understand the nature of the job, the difficult circumstances faced by all
- \* Be a boy-scout (always ready)
- \* Do not complain (hotels, long travel hours, etc.)
- \* Comply with deadlines
- \* Be ready to change plans at the last minute

# *Finally...*



If at first you don't succeed, try and try again....

As one consultant said: *Don't expect to make money on the first couple of contracts – just “make” a reputation. Be happy if you break even.... And hope to be contracted again for bigger jobs.*