



*Presented by*  
**Falconbury**

# Drafting Winning Proposals for Legal, Commercial and Strategic Excellence

**26-27 January 2026**  
+ 7-8 July 2026

Learn to draft clear, compelling proposals that serve as both legal offers and persuasive sales tools - capturing pricing, contractual obligations, and showcasing alignment with customer needs and competitive advantage.



**Format:**  
Live online



**CPD:**  
12 hours for your records



Certificate of completion

# Course overview

**In today's highly competitive and regulated procurement environment, getting the proposal right is about more than just responding to a brief** - it's about creating a clear, commercially strong and legally robust offer that meets customer needs, manages business risks and showcases why your offering is the preferred option.

This practical and intensive training course has been expertly developed to help commercial and contracts professionals master the art of crafting compelling proposals that serve as both legal and sales documents. From understanding legal positioning in the bidding process to confidently defining scope, pricing risk and articulating value, the expert trainer will explore every critical element that strengthens proposals and increases win rates.

You'll also learn how to clearly align your proposal with your customer's decision-making criteria, showcase your organisation's unique offering and manage the entire bid lifecycle with structure, compliance and clarity.

Whether you're dealing with RFPs, RFQs or ITTs, this course will help you build persuasive proposals that appeal to potential customers in meeting their needs while protecting your exposure to potential risks.

## Benefits of attending

By attending this course you will:

- **Learn** how to develop strategic, customer-focussed proposals that focus on client's needs and priorities
- **Reduce** legal risk by understanding how proposals become binding and how to avoid hidden legal pitfalls
- **Understand** how to enhance risk management by aligning price to risk exposure and limiting liability with effective wordings
- **Get to grips** with developing clear value propositions that differentiate your offer
- **Master** bid processes by streamlining the process and ensuring compliance through structured internal reviews
- **Enhance** your executive summaries and communicate with impact
- **Gain** confidence in engaging with procurement professionals during the bid process

## Who should attend?

This course will be particularly valuable for all professionals involved in drafting, negotiating or reviewing proposals, including:

- Commercial managers
- Contracts managers
- Contract negotiation specialists
- Proposal / Bid managers
- Project managers
- Business development managers
- Strategic account managers
- Procurement managers
- Operations managers

# Programme

## Day 1

### Module 1: The proposal as a legal document

#### Understanding the bidding process and legal implications

- Pre-qualification (PQQ's) / preferred suppliers; Request for Information (RFI); Request for Quotation (RFQ); Invitation to Tender (ITT); Best and Final Offers (BAFO)
- Legal considerations:
  - Confidentiality – Non-Disclosure Agreement / Confidentiality Agreement
  - Quotation v Invitation to Treat. 'Subject to contract'
  - Battle of the forms, Offer and Acceptance. The proposal forming part of the legally binding contract
  - Offer duration / expiration

#### Capturing your scope of supply within a legal framework

- Clarity of offer
  - Clearly defined obligations and ownership of those obligation including 'dependencies' on Customer
  - Clearly defined acceptance criteria / measurement mechanism
  - Assumptions & Caveats
- Exercises – Drafting / reviewing a scope of supply. Peer / Red Team reviewing

#### Pricing to reflect the allocation of liability / risk

- Allocation of liability / risk and reflecting it in pricing:
  - Clarity of ownership of liability / risk if obligation not met
  - Ensuring price reflects allocation of liability / risk. Quoting subject to own standard terms and conditions or Customer's terms and conditions
  - Liability for 'fit for purpose' - Performance specification v Conformance specification
  - Exclusions / Indemnities / Disclaimers / Limit of Liabilities
  - Managing identified high probability / high impact risks through the contract / solutions not contingency budget
- Exercise – Price v Scope / Liability & Risk. Removing ambiguity / passing or reducing liability to enable removal of contingency.

### Internal governance process

- Purpose and value
- 'Go/No Go' / 'Bid/No Bid' reviews
- Proposal and Pricing Approvals / Peer or Red Team Reviewing
- Authorised Representatives / Power of Attorney

### Module 2: The proposal as a sales document

#### 'WHY' first, then 'What'

- 'Start with Why?' (Simon Sinek) – TED Talk video
- Exercise – 5 Whys
- Exercise – Applying the same principles of a 'Performance Specification' to drafting a proposal. The outcome of a Performance Specification not the input of a Conformance Specification

#### Understanding your customer's needs. What is their 'problem' that needs solving?

- 5 Rights of procurement – Quality, Quantity, Place, Time, Price
- Commercial Off-The-Shelf (COTS) / standardised v bespoke / need for innovation, research and development
- RAQSCI - Regulation, Availability, Supply Quality Assurance, Service Requirements, Cost and Innovation
- 10 C's - Competency, Capacity, Commitment, Control, Cash, Cost, Consistency, Corporate Social Responsibility/Clean, Culture and relationships, and Communication
- Corporate Social Responsibility (CSR) / sustainability

# Programme

## Day 2

### Understanding your customer's selection criteria / priorities

- Kraljic matrix - customer's businesses priorities - critical, strategic, tactical or bottle neck
- Iron Triangle - Scope, Schedule, Cost
- MIL - Must have, Intend to have, Like to have
- Exercise - MIL

### Winning themes - showcasing / story-telling 'WHY' your offering is the Customer's 'Best Realistic Alternative' (BRA) / how it meets your customer's needs / priorities

- Identifying / communicating your Unique Selling Proposition
  - Porter's generic strategies – cost leader, differentiation, niche
  - Defining the Value Proposition: unique benefits, measurable value, differentiation/competitive advantage
- Rationalising your price. MEAT - Most Economically Advantageous Tender / value for money
- Instilling confidence - demonstrating not just stating. Evidencing credentials / capability / credibility
- Addressing any negatives past experiences / reviews / issues
- Capture the key points in your Executive Summary
  - When to write it
  - Structuring, style and content to reflect audience
- Exercise – Asking leading, open questions of your Customer. PULSE model (Position, Understand, Leverage, Solution, Evolve)
- Exercise – Capture information from previous exercise and draft Exec Summary

### Offering deviations from requirement set out in RFQ / ITT

- Proposing alternative / additional options separately from core offering. Explaining reason for deviation, e.g. value added / benefits of alternative / additional options
- Offering a solution which addresses future requirements
  - Identifying potential opportunities (SWOT – opportunities) for: increased market share and/or cost savings / value engineering (improvements / efficiencies), and showing how these might be realised
  - Addressing potential challenges / risks (SWOT – Threats / STEPPLED – Social, Technological, Economic, Environmental, Political, Legal, Ethical, Demographics), demonstrating how these will be managed to minimise criticality
- Exercise – Drafting subsection of a proposal offering opportunity
- Exercise – Drafting subsection of a proposal offering a pro-active risk management contingency plan

### Module 3: Writing the proposal to enable easy evaluation

- Answering the 'exam question' / using customer proforma provided in RFQ but still embedding: WHY you; your unique selling points (USPs) / what differentiates you
- If no customer proforma, suggested proposal structure.
- Complying with bid requirements to avoid elimination, enable easy evaluation / comparison by the customer ('apples for apples'), demonstrating respect to retain good relations.
- Clarity & easy of understanding. 5C's / 7C's of communication – concise, clear, complete, correct, consistent, coherent, concrete, courteous
- Exercise – 5C's writing skills

### Module 4: Managing the bid process

- Timing / planning the process to allow Red team / Peer reviewing / Internal governance process complied with
- Engaging stakeholders
- Selecting and role of bid team members

# Presenter



## Catherine Hurst

**Catherine Hurst BSc(Hons), CIMDip, PgDL**, is an independent consultant in the contract and commercial fields. She was formerly a Commercial Manager at BAe Systems, following previous contract/commercial roles with GEC and Siemens. She has extensive practical experience of bid management, contract drafting and negotiation, contract and subcontract management as well as commercial risk management, both with UK and overseas customers and suppliers, in the private and public sectors.

She is a highly experienced trainer, having a style which brings a subject to life, creating interest and stimulating the enthusiasm of delegates. She combines academic best practice with real world experience.

She lectures Chartered Institute of Procurement and Supply (CIPS) diploma, levels 4, 5 & 6 at Chichester college. As well as being a member of CIPS, Catherine has a degree in Management Studies, a Chartered Institute of Marketing diploma and more recently achieved a distinction in her Common Professional Examination (CPE)/Post-grad diploma in law, winning the prize for the highest achieving student in the contract law module.

Catherine has successfully provided training to organisations across a wide variety of industries, including:

*Transport / utilities / energy / construction / engineering / IT / telecoms:* Network Rail, ScotRail, Balfour Beatty, London Underground, Westinghouse Springfields Fuels, General Dynamics, Siemens, Metronet, Thales, ABB, Hitachi, Jungheinrich, Honeywell, PALL Europe, Senior Aerospace BWT, RES (Renewable Energy Systems), AGI, Silvertown, QinetiQ, Clyde Pumps / Weir Pumps, Scottish Power, NCOC (North Caspian Operating Company), Computacentre, CISCO, BT, United Utilities

*Health / pharmaceutical / education:* Nuffield Health, Surrey PCT, Bristol Myers-Squibb, Newcastle University, Exeter University

*Public:* Forensic Science Services, Office for National Statistics, DARA (Defence Aviation Repair Agency), Metropolitan Police


*Charity:* Phoenix Futures, Homegroup

*Retail:* Co-op


# Course dates


<b>26-27 January 2026</b>	<b>Live online</b> 09:30-17:00 <b>UK (London)</b> (UTC+00) <i>Course code 16775</i>	GBP <b>999</b> <del>1,199</del> EUR <b>1,399</b> <del>1,679</del> USD <b>1,607</b> <del>1,919</del> <b>Until 22 Dec</b>
<b>7-8 July 2026</b>	<b>Live online</b> 09:30-17:00 <b>UK (London)</b> (UTC+01) <i>Course code 16776</i>	GBP <b>999</b> <del>1,199</del> EUR <b>1,399</b> <del>1,679</del> USD <b>1,607</b> <del>1,919</del> <b>Until 02 Jun</b>

## How to book

 **Online:**  
[ipi.academy/3342](https://ipi.academy/3342)

Alternatively contact us to book, or if you have any queries:

 **Email:**  
[info@ipiacademy.com](mailto:info@ipiacademy.com)

 **Phone:**  
[+44 \(0\)20 7749 4749](tel:+442077494749)

## Discounts

- Booking more than one delegate on any one date qualifies for a **30% discount** on the second and subsequent places.
- Most events qualify for an **early booking discount** prior to 6 weeks before the course date. Be sure to check on our website, where the latest discounts will be shown.

## Further information

**Fee**  
The fee includes all meals and refreshments for the duration of the course (for venue-based courses) and a complete set of course materials (provided electronically). If you have any particular requirements, please advise customer services when booking.

**Please note**  
IPI Academy (and our training partners) reserve the right to change the content and timing of the programme, the speakers, the date and venue due to reasons beyond their control. In the unlikely event that the course is cancelled, we will refund the registration fee and disclaim any further liability.

**Terms and conditions**  
The rest of the our terms, the event cancellation policy and the terms and conditions are on our website, please visit [ipi.academy/content/terms-and-conditions](https://ipi.academy/content/terms-and-conditions)



## Run this programme in-house for your whole team

Coming to IPI Academy for your in-house training provides an all-inclusive service which gives you access to a wide variety of content, learning platforms and delivery mechanisms as well as your own personal training adviser who will work with you from the initial enquiry through to feedback and follow-up after the programme.

With over 600 trainers, all practitioners and experts across a huge range of fields, we can provide the training you need, where you need it, when you need it, and at a price which suits your budget. Our approach to tailored learning and development consists of designing and delivering the appropriate solution for each client.

For your FREE consultation and to find out more about how we can work with you to solve your training needs, please contact our training advisers:



**ALEKSANDRA BEER**

**Tel:** +44 (0)20 7749 4749

**Email:**

[inhouse@ipiacademy.com](mailto:inhouse@ipiacademy.com)



**YESIM NURKO**

**Tel:** +44 (0)20 7749 4749

**Email:**

[inhouse@ipiacademy.com](mailto:inhouse@ipiacademy.com)



**Harry ALTAMONT**

**Tel:** +44 (0)20 7749 4749

**Email:**

[inhouse@ipiacademy.com](mailto:inhouse@ipiacademy.com)



**IPI**  
Academy

IPI Academy is a training initiative of Falconbury and Management Forum; leading providers of industry training for over 30 years, based in the UK.

10-12 Rivington Street  
London EC2A 3DU

[ipi.academy](http://ipi.academy)

**Tel:** +44 (0)20 7749 4749

**Email:** [info@ipiacademy.com](mailto:info@ipiacademy.com)