



## **PARTNERING WITH PITCH PROCESS**

**Proposal to Merit Contractors Association**

**June 25, 2019**



## **ABOUT US**

Founded in 2014 as bbaMKTG, the company underwent a directional brand change in 2017, rebranding as Pitch Process (Pitch).

Pitch offers coaching and consulting services for the proposal, procurement, and bidding process across western Canada. Our goal is to help businesses win work in a competitive market through training, strategy, and process implementation.

The two founding member of Pitch Process – Amber and Dayna – have a combined 20+ years experience submitting compliant and successful RFI, RFEOI, RFQ, and RFP documents to multiple industries across Canada.

# MEET PITCH

## **Amber Alexander, BSc, BMgt**

Amber has 8+ years experience in proposal & bid document development, and knows what it takes to execute a compliant and winning bid.

A real team player, Amber is passionate about sharing her enthusiasm for process and organization and understands the frustrations that come with proposal preparation. Her strength lies in procedures, tasks, and attention to detail which help to increase efficiency and reduce stress for the hardworking proposal staff she trains.

Her goal is to ensure each person is equipped with all the necessary building blocks to support a winning strategy. Amber has submitted hundreds of compliant proposals, winning companies in the hundreds of millions of dollars in awarded work throughout her career.



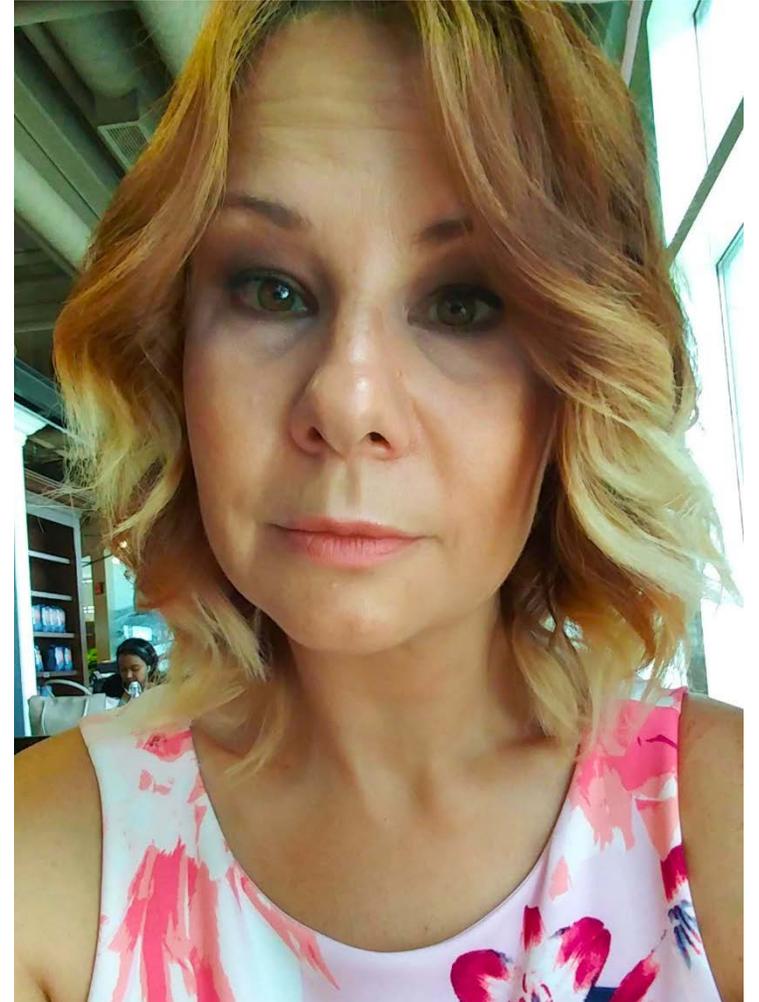
# MEET PITCH

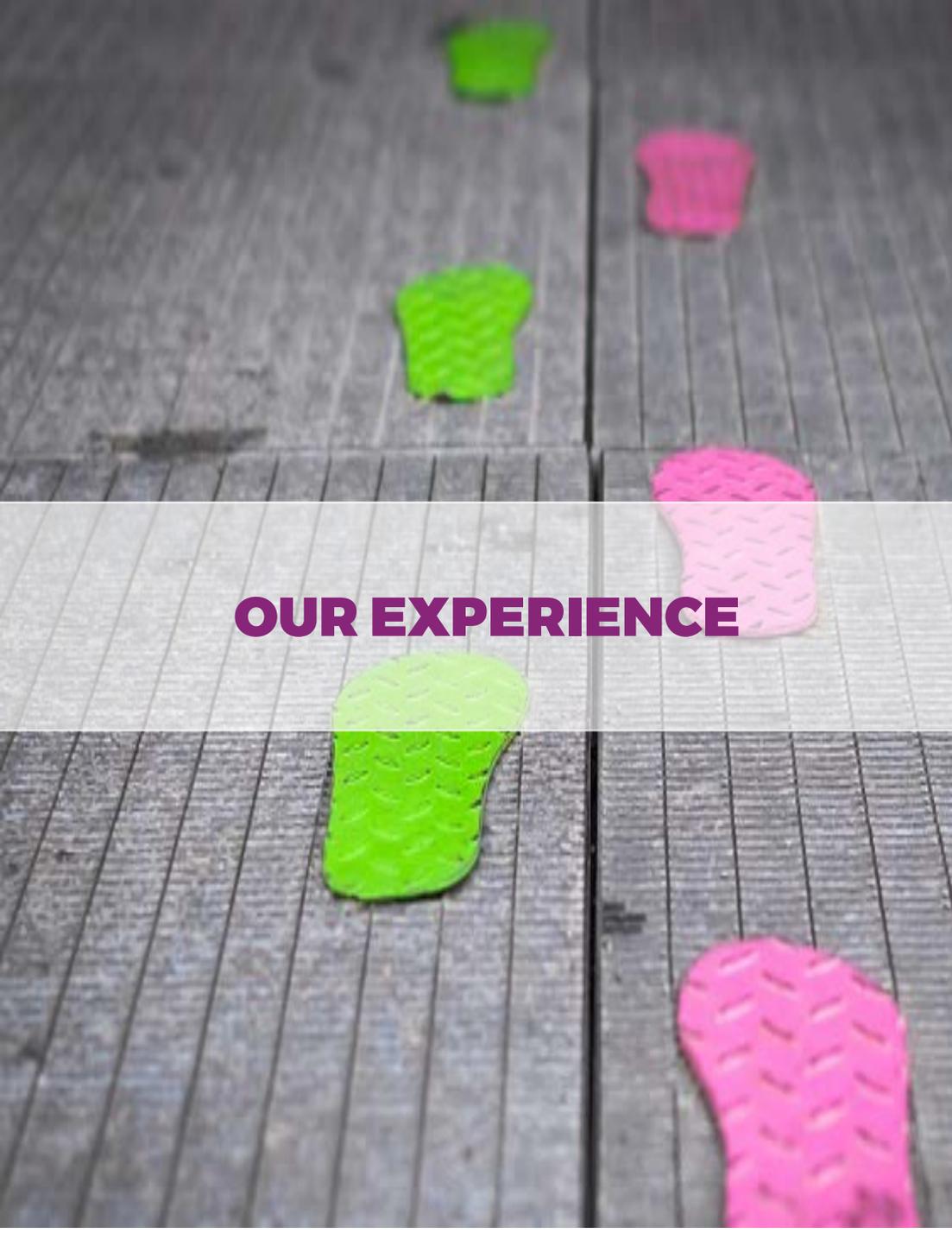
## **Dayna Burnell, BA**

With 15+ years of proposal coordination and management experience, Dayna is an expert in all things related to the proposal and bid document process. She has worked with large, global organizations, coaching them through process change and implementation.

She understands both the client and vendor side of the proposal process and works closely with companies to implement change management, proposal win strategies, and coach stakeholders on proposal processes.

Over the course of her career, Dayna has successfully bid on some of the largest projects in Alberta, awarding her clients billions of dollars of won work.





## OUR EXPERIENCE

Pitch works with many organizations across a myriad of industries. Some of our clients include:

construction	architectural
information technology	defence
civil infrastructure	engineering
government	hazardous materials
health & wellness	insurance
public relations & marketing	telecommunications

We offer a variety of services relating to proposals and procurement, including:

- Proposal Strategy & Implementation
- Coaching & Training
- Document Audits
- Proposal Management
- Writing copy, editing, and QA/QC
- Document Design



## **PARTNERING WITH MERIT**



## **EDUCATION**

Pitch has extensive experience coaching organizations of all shapes and sizes through process implementation, and we pride ourselves on being leaders in facilitation and education where proposal process is concerned.

We've been facilitators in both public and private sectors, and have taught sessions at post secondary institutions, construction associations, and within the private sector.

Proposed course offerings for Merit members are outlined on the following pages.

# COURSE OFFERINGS

**Navigating an RFP Document** (tailored for businesses who are just beginning to submit competitive proposals):

- The importance of the RFP
- Understanding the client and the opportunity
- Recognizing flags and signals for wired opportunities
- Understanding the competitive landscape
- Breaking down evaluation criteria
- Planning your approach
- The importance of a debrief

**Proposal Writing Skills** (tailored to writers, non writers, construction & project managers):

- Getting the structure right
- Clear and concise messaging
- Conveying your brand
- Focusing on the client
- Creating hard-working headings
- Overcoming grammatical and consistency errors
- Proper punctuation
- Sewing up content
- Writing from scratch with confidence
- QA/QC – feedback is key

# COURSE OFFERINGS

## **Identifying & Overcoming Challenges w/Proposal Writing & Coordination** (tailored to proposal & marketing coordinators)

- Pre proposal planning – how to equip your team for success
- Expectations and roles of the team
- Time management – using tools to maximize your time spent
- Working with subject matter experts – challenges, obstacles w/communication
- Workplace demographics – communication strategies
- OT & burnout – finding balance
- Training and education to remain competitive
- The KISS principle

## **From Whiskey to Winning – navigating the shift in winning work** (BD, PMs, C Suite)

- A brief history of proposals
- Understanding the ‘fair and transparent’ process
- To go or not to go – the myth of the optics RFP
- Managing relationships in the public sector
- Supporting your proposal team
- Navigating demographics
- The importance of advocacy



## **PARTNERING WITH MERIT**



## **COMMUNITY BENEFIT AGREEMENTS & THE RFP PROCESS**

Community Benefit Agreements (CBA) are aimed at strengthening the community through using local and underrepresented workforce groups to complete public infrastructure projects. Geared specifically for trades, the goal is to deliver jobs, training, apprenticeships, and creating opportunities for target populations including indigenous peoples, women, and youth across the province.

CBAs have been used across the United States and Ontario for years and, as of 2018, implemented on two projects in British Columbia. CBA models differ across provinces and states, often tailored based on the community's needs and current government policies.

# COMMUNITY BENEFIT AGREEMENTS

While CBAs are not currently legislated in Alberta, the potential to move to this type of procurement process is very likely on the horizon. We understand CBAs in Alberta will be tailored to benefit our province specifically, but there is no doubt this potential implementation will change the face of our construction industry.

Navigating RFPs can be a challenging and frustrating endeavor for many local small and medium sized construction companies. The addition of CBAs to the procurement process can potentially muddy the waters further.

There's an opportunity for Merit to offer resources, training, and guidance to their members through a partnership with Pitch. We've seen variations and glimpses of CBA-type practices in RFP documents for years, and have helped clients address various requirements requesting descriptions and examples of using local workforce and targeted hiring practices involving First Nations, women, and apprentices.

# COMMUNITY BENEFIT AGREEMENTS

Pitch can be a resource to Merit's members – helping them navigate the changes in response criteria where it relates to CBAs, including:

- guiding companies through the overall RFP process
- helping them understand the changes in proposal requirements when CBAs are implemented
- providing direction and feedback on how to respond to the new RFP requirements
- helping companies develop updated & compliant proposal content around CBAs

While we are uncertain what CBAs will look like for businesses and Albertans, it will be crucial for companies to be prepared and ready to respond. Pitch will be there armed with knowledge and ready to help local businesses through this transition as it relates to the RFP process. Our goal is to make sure companies are not left behind or at a disadvantage when responding to RFPs in the wake of these changes.

In addition to procurement coaching Pitch recommends having HR consultants / specialists available to help guide Merit member companies through the legal aspects of hiring and implementing hiring processes in line with CBAs.



## **VALUE TO MERIT'S MEMBERS**

We offer value to Merit's members as skilled professional proposal consultants.

Our target market is small to mid-size businesses, and we have been specializing in the construction industry specifically where proposals are concerned.

In addition to working with vendors, we've worked extensively on the client side, with municipalities across Alberta and BC, and we can help your members be competitive through educating them on the importance of submitting a compliant proposal.

After our discussions with Merit, we feel aligned with Merit's goals and objectives in supporting the local construction community. We believe our experience and knowledge can benefit both Merit College of Construction and Merit Community. We look forward to the opportunity to collaborate with Merit to help enhance the services and resources provided to members while continuing to support growth within our construction industry.