



BUYER EARLY ENGAGEMENT

A Bid Prompts card deck for firms who sell to the public sector.

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BUYER EARLY ENGAGEMENT

Build relationships before the tender with these critical question prompts.

Getting started

HOW TO USE THESE QUESTION PROMPTS

These cards are designed to help those targeting public sector buyers engage effectively with them, pre-tender.

Each card contains a number of high-level prompts, from buyer personas, procurement notices and call planning, to gathering pre-tender intelligence.

Using these cards in sales huddles can ensure that your sales and marketing activities are welcomed by buyers by providing added value at every stage.

Through their repeated use you can increase your chances of bid success.

Buyer Early Engagement

DEFINING EARLY ENGAGEMENT

Key questions to consider are:

- Are we starting conversations before tenders are drafted?
- Are we engaging far enough in advance to make an impact?
- Is our team trained to spot early signals and start conversations?
- Are we aligning our messaging to what matters at this early stage?
- Do we know which tools help us uncover pre-tender opportunities?

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UNCOVERING BUYER PAIN POINTS

Key questions to consider are:

- Are we actively listening for buyer's challenges in early engagement?
- Have we trained our team to dig into the buyer's frustrations?
- Do we adapt our messaging to the pain points we've uncovered?
- Are we offering insight into how others tackle the same problems?
- Are we linking buyer needs to specific outcomes we've delivered?

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INVOLVING MARKETING EARLY

Key questions to consider are:

- Have we aligned marketing plans around early engagement goals?
- Is our brand well known and trusted by public sector buyers?
- Are we building awareness long before tenders are issued?
- Do our campaigns show we understand public sector needs?
- Do we highlight our ability to solve pain points, not just our services?

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DEVELOPING BUYER PERSONAS

Key questions to consider are:

- Have we created personas for our ideal public sector buyers?
- Do we understand their pressures, drivers and success metrics?
- Are we using insights from real calls to refine our buyer personas?
- Do we use personas to guide our sales outreach and messaging?
- Have these personas been shared across sales and marketing teams?

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RESEARCHING BEFORE EARLY SALES OUTREACH

Key questions to consider are:

- Do we check previous procurement history before reaching out, including current relationships?
- Have we used FOI requests or public portals to gather insight?
- Are we clear on what the buyer is likely to need next?
- Have we read any papers that mention upcoming projects?
- Are we following and engaging with buyers on LinkedIn beforehand?

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SETTING EARLY ENGAGEMENT GOALS

Key questions to consider are:

- Do we know what we want to learn from our early engagement?
- Are we asking what success will look like for the buyer this time around?
- Are we checking for shifts in their priorities or appetite for innovation?
- Do we ask who will be involved in shaping the next procurement?
- Have we created a feedback loop so our team can share what they learn?

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PLANNING OUR CALL STRATEGY

Key questions to consider are:

- Are we using our upfront research about the buyer to guide our call?
- Do we open with a reason to listen, not a pitch?
- Are we referencing specific upcoming projects when we call?
- Have we practiced summarising our value in one impactful line?
- Are we clear on our desired outcome from the call?

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EQUIPPING OUR SALES TEAM TO SUCCEED

Key questions to consider are:

- Are we using tech to alert us to early-stage opportunities?
- Can all our sales team access our early engagement intelligence?
- Do we regularly review whether our team is confident with pre-procurement sales?
- Are new starters trained on how to spot early signs of procurement?
- Are we avoiding data silos by centralising insight and contacts?

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BUILDING OUR CONTACT DATABASE

Key questions to consider are:

- Is our public sector contact list up to date and accurate? Does it contain the right buying organisations?
- Do we have procurement contacts alongside those within directorates?
- Have we mapped buyers, influencers and potential end users separately?
- Are we using CRM tools effectively to tag and track our outreach?
- Are we checking that our data is compliant with the TPS and CTPS?

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SCOPING POTENTIAL DELIVERY PARTNERS

Key questions to consider are:

- Has our early research shown we'll need a partner for this opportunity?
- Have we mapped out which partners we could informally approach?
- Should we align with a specific partner to present a joined-up offer?
- Are we preparing other options in case partners cannot deliver?
- Can we confidently position ourselves as the lead supplier capable of coordinating delivery?

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PRIORITISING EARLY ENGAGEMENT ACTION

Key questions to consider are:

- Do we filter opportunities based on likely contract size, strategic fit and deliverability with a simple checklist?
- Have we assessed which opportunities align best with our strengths?
- Are we focusing on buyers who show early signs of openness to engagement?
- Are we willing to walk away early from low-value or unlikely wins?

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COMPETITIVE POSITIONING CLARITY

Key questions to consider are:

- Are we analysing who the incumbent supplier is and how they are performing?
- Do we know which other suppliers are likely to also be in touch?
- Do we know the weaknesses in our competitors' offerings?
- Are we tuning our early messaging to highlight differences that matter to the buyer?

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KNOWING THE BUYING LANDSCAPE

Key questions to consider are:

- Are we looking beyond the obvious buyers and major departments e.g. non-ministerial departments, the emergency services, higher education and district councils?
- Do we understand who influences buying in each organisation?
- Are we building relationships with influencers as well as formal buyers?
- Have we updated our buyer maps in the last six months?

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GATHERING BUYER INTELLIGENCE UPFRONT

Key questions to consider are:

- Do we know who the buyer previously awarded contracts to?
- Are we tracking spend patterns?
- Do we understand if the buyer typically works with SMEs or large firms? Are we tailoring our approach based on this intelligence?
- Have we assessed whether the buyer values innovation or price?
- Are we using past tender documents to prepare early for future tenders?

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UNDERSTANDING THE PROCUREMENT ACT 2023

Key questions to consider are:

- Has our sales team grasped how this Act changes early engagement?
- Do we understand how to navigate PME, PPNs and Pipeline Notices to learn of upcoming procurements?
- Do we understand how these notices may affect any current competitive advantage we hold?
- Do we know how to incorporate what we learn from this market engagement into our sales process?

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PLANNED PROCUREMENT NOTICES

Key questions to consider are:

- Are we regularly checking for new PPNs in our target sectors?
- Have we trained the sales team to interpret what a PPN signals?
- Are we using PPNs to allocate sales resources and shape pipeline?
- Are we treating PPNs as triggers for active sales engagement?
- Do we track which of our target buyers routinely publish them and which don't?

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ENGAGING THROUGH PME NOTICES

Key questions to consider are:

- Are we monitoring for Preliminary Market Engagement (PME) notices across our market?
- Do we respond quickly when buyers begin early market engagement?
- Are we capturing insight from PMEs to inform future bids?
- Have we ever missed an opportunity because we weren't tracking PMEs?
- Are we following up with the buyer after PMEs to keep dialogue going?

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WATCHING PIPELINE NOTICES

Key questions to consider are:

- Are we monitoring for UK1 pipeline notices from large public bodies?
- Do we know which buyers are required to publish them?
- Are we planning some of our early engagement outreach around what we learn from these notices?
- Are we identifying gaps i.e. no notice published but where spend is due?
- Are we ready to track which notices become tenders and which don't?

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READING WHAT PUBLIC BODIES PUBLISH

Key questions to consider are:

- Are we scanning board papers, strategy reports and cabinet agendas? If not, can we buy this intelligence e.g. Oxygen Insights?
- Have we built a routine for reviewing forward plans from key buying authorities?
- Are we using insights from these documents to shape conversations?
- Do we capture and share these findings with our sales team?

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TRACKING EXPIRING CONTRACTS

Key questions to consider are:

- Are we monitoring which contracts are due to expire, and start outreach 6-12 months before expiration?
- Are we using these expiry dates to guide our pipeline planning?
- Have we identified the high-priority contracts we most want to win?
- Do we have any intelligence on the performance of incumbents?
- Have we linked expiring contracts to the right decision-makers?

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GETTING READY FOR EARLY ENGAGEMENT

Key questions to consider are:

- Are we ready to act fast when early opportunities emerge?
- Do we have clear internal ownership for capturing and sharing early insights?
- Are we confident that everyone understands what early engagement really means?
- Do we have the right research, tools and data to support meaningful conversations?

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MAPPING PROSPECTS TO OUR NETWORKS

Key questions to consider are:

- Do we have existing contacts who could introduce us to this buyer?
- Have we explored LinkedIn to identify mutual connections?
- Are any of our stakeholders or partners already working with them?
- Are we asking for introductions from those with strong ties?
- Can we leverage local forums or events where introductions can happen naturally?

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CONTACTING THE RIGHT PEOPLE

Key questions to consider are:

- Do we know who makes and who influences decisions in our area?
- Are we engaging procurement teams early, not just directors?
- Have we asked procurement how they wish to be engaged pre-tender?
- Are we building relationships with those who will be involved in specification writing?
- Have we tested who is most responsive to our outreach?

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USING EVENTS TO CONNECT EARLY

Key questions to consider are:

- Are we attending the right market engagement events to meet buyers?
- Do we use these events effectively to gather buyer intelligence and record this in our CRM or sales plans?
- Are we preparing questions that show we've done our homework?
- Have we followed up promptly with contacts made at recent events?
- Are we seen as helpful contributors at events or just another supplier?

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MAKING THE MOST OF MEET-THE-BUYER DAYS

Key questions to consider are:

- Are we treating these events as a serious engagement opportunity?
- Do we prepare talking points and questions in advance?
- Have we briefed our team on who they might meet and what to ask? Do we have any follow-ups planned?
- Do we use these events to test early messaging and positioning?
- How can we be seen to support the event, above simply attending?

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ENGAGING STRATEGIC INFLUENCERS EARLY

Key questions to consider are:

- Are we identifying influencers beyond procurement teams?
- Have we built links to technical specifiers, service heads, or board members?
- Are we engaging elected officials or community leaders where relevant?
- Are we offering value and insight to influencers, not just formal buyers?
- Are we tracking how influencers impact bid outcomes over time?

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ADAPTING TO DIFFERENT CULTURES

Key questions to consider are:

- Do we tailor our early engagement approach between central gov, local councils, the NHS, and others?
- Are we sensitive to each buyer's formal processes and hierarchy?
- Are we adjusting our pace based on the buyer's typical decision-making speed and attitudes to innovation?
- Do we prepare sector-specific examples when engaging different public bodies?

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PROVIDING BUYERS WITH EARLY INPUT

Key questions to consider are:

- Are we engaging before specifications are locked down?
- Are we suggesting improvements to make tenders more deliverable?
- Do we encourage buyers to share that insight equally with all suppliers?
- Are we documenting our input in case of transparency reviews?
- Do we know how to input without overstepping and losing neutrality?

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BUILDING TRUST VIA EARLY ENGAGEMENT

Key questions to consider are:

- Are we actively listening more than we are selling?
- Do we share valuable insights without expecting immediate return?
- Do we consistently deliver on small promises made early?
- Are we building individual credibility alongside organisational credibility?
- Are we being transparent about what we can and can't offer?

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SHOWING HOW WE ADD VALUE EARLY

Key questions to consider are:

- Are we offering practical advice before procurement begins?
- Can we share lessons learned from similar projects to help shape theirs?
- Do we show buyers what they didn't know they needed e.g. legislation?
- Have we showcased innovations that could influence the tender specification?
- Are we positioning ourselves as trusted advisors, not just suppliers?

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REDUCING ENGAGEMENT RISKS

Key questions to consider are:

- Are we helping buyers spot potential risks before formal procurement starts? If not, how can we bake this into our early engagement activity?
- Have we positioned ourselves as problem-solvers by helping buyers spot gaps in their scope or planning?
- Should we treat risk reduction as part of our value proposition?
- Do we follow up on risk discussions to show we're proactive?

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CONTENT FOR EARLY ENGAGEMENT

Key questions to consider are:

- Are we producing sector-relevant, useful content that opens doors?
- Are we using content to demonstrate expertise without being salesy and putting off buyers?
- Is our early engagement content aligned with known buyer challenges?
- Are we giving our sales team the tools and materials that spark meaningful conversations?

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USING FRAMEWORKS STRATEGICALLY

Key questions to consider are:

- Are we using frameworks to build early visibility and credibility with target buyers over time?
- Do we know which frameworks are best suited to our products and services? If not, how can we find out?
- Have we reviewed which of our target buyers use which frameworks regularly? Are we listed on them?
- Are we tracking our competitors' framework participation and performance?

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REVIEWING OUR CURRENT CONTRACTS

Key questions to consider are:

- Are we actively managing our current customer relationships to combat early engagement approaches from competitors?
- Have we mapped opportunities to expand within existing contracts?
- Are we using delivery successes to create case studies or referrals to our target buyers elsewhere?
- Are we keeping an eye on our renewal points and engaging early?

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PRE-PROCUREMENT RED FLAGS TO NOTE

Key questions to consider are:

- Are we assessing how open buyers are to new suppliers and ideas?
- Are we recognising when early buyer engagement is only for show?
- Are we focusing effort where early engagement can truly influence?
- Does our team know to qualify-out weak opportunities early?
- Do we adapt our investment of time if red flags start to appear?

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BUILDING ON OUR EARLY ENGAGEMENT

Key questions to consider are:

- Do we have a plan to keep warm relationships alive during the buying cycle with useful updates & insights?
- Are we tracking key personnel changes within the buying body?
- Are we recognising when to pause outreach if buyers go cold?
- Are we prepared to re-energise relationships when the procurement finally moves forward?

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FORECASTING EARLY ENGAGEMENT PIPELINE

Key questions to consider are:

- Are we recording early signals into our sales pipeline consistently?
- Do we have a structured way of weighting early opportunities?
- Are we adjusting forecasts when early engagement suggests delays?
- Are we linking early intelligence into account growth planning?
- Are we sharing early pipeline insights with delivery and resourcing teams?

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ALIGN EARLY ENGAGEMENT WITH BID STRATEGY

Key questions to consider are:

- Are we feeding insights gained from early engagement into bid planning?
- Are we setting up our bid teams with real intelligence, not assumptions?
- Have we captured buyer priorities clearly enough to shape win themes?
- Are we identifying the success factors buyers have hinted at early?
- Do we measure how early engagement improves our win rate over time?

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