Successful Tendering Guide

The Tender Process
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June 2012
Bid or No Bid

Be patient and wait for the tender opportunity that is right for your business - it is a waste of time tendering for contracts that you are not going to win.

The most common reason for lack of success is poor choice of tender opportunity.
First steps

When you receive notification of a tender which is of interest:

• Download all documentation and store it in a separate folder on your computer system. If only a hard copy of the tender document is available make copies and keep the original safe. Do not mark the original in any way as it will be needed for final submission.

• Inform the core bid team and circulate the key documents to them.

• Read the documents thoroughly. Assessing whether a tender is right for your business is not always possible from the short tender notification description or summary, so you may require a detailed look at the tender documents and specifications.

In particular read the contract - sometimes there are terms within the contract which companies are not prepared, or unable, to fulfil, for example, areas around intellectual property.
Bid or No Bid decision

The decision to bid or not to bid for a contract should be a carefully considered process balancing the opportunity, against a realistic evaluation of the likelihood of success. The approach should be systematic, incorporating a scoring matrix or key bid/no bid questions which will help evaluate the decision and remove any emotion that may be associated with the opportunity.

Bid/No Bid Questions

What are the mandatory requirements (for example financial stability, quality accreditations) and can we meet them?

Buyers generally ask for (audited) accounts from the last three years. Has your business seen year-on-year growth and if not is there a valid explanation for why not?

If requirements are not mandatory then can you demonstrate that your business is operating to a set of standards that are equivalent? For example, your business may not be ISO accredited, but may use an internal quality system.

Can we show relevant experience? Have we done this type of work before? Do we need to partner?

Buyers like suppliers who can prove they can do the job, therefore references from similar organisations for similar work are ideal. If you haven’t got these, you will need to show you have transferable skills from customers with similar needs.

If the experience is not a ‘core competence’ (in other words it represents only a small element your business’s work) think carefully.

If there are some areas that your business cannot manage, the chances of qualifying or winning the tender are seriously reduced. You may need to consider partnering.
Who is the competition?
Do you know how many others you will be competing with and who they are? How do your strengths and weaknesses compare with theirs? Does a competitor have an existing contract with the Buyer? Who is currently servicing the contract?

Is the contract the right size for my business? Will this clash with any existing or upcoming work?
It is risky to bid if a tender value is more than 25% of turnover. Buyers will check that the tender contract value will not be too much for the company to handle. Do not overstretch the business to the point where service or quality issues will arise.

What is the profit potential? What impact will there be on the business cashflow?
Winning a contract can put a strain on a business’s financial resources. It is important to fully understand and assess the risk of the working capital requirements of the contract and whether your business can support any peaks that may occur. A careful assessment should be made at this point of the potential profit to be made. Is it likely that you will be forced to bid low? If so, is it still worthwhile to take on the work, even at a marginal price to perhaps reinforce your position in the sector?

Do we have sufficient resource to respond professionally within the deadline?
Tender writing is time consuming – you will need to invest a significant amount of time and resource to creating a winning bid. There is no minimum limit on the deadline for tenders, but typically the timeframe falls between two and four weeks.

Depending on the type of contract and Buyer, the bid/no bid decision can be quite straightforward or may take some consideration, balancing a set of points for and against. To help with the process it is useful to have a consistent procedure in place to ensure that time and money are not spent wastefully on contract opportunities which are to no economic or strategic benefit. A standard bid/no bid form can be a useful tool to assist with the decision.

If you decide not to bid, and you were invited to do so directly by the Buyer, tell the Buyer as soon as possible of your intention. Explain carefully, in a conscientious way, the reasons for your decision, being careful not to prejudice your chances of being invited to bid for other work in the future.
## Tools

### Bid/No Bid Form

<table>
<thead>
<tr>
<th><strong>TENDER INFORMATION</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenderer:</td>
<td>Tender Title:</td>
</tr>
<tr>
<td>Contact Name and Details:</td>
<td>Description:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>SERVICE/PRODUCT CHECKLIST</strong></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bid Type</strong></td>
<td><strong>Source</strong></td>
<td><strong>Type of Business</strong></td>
<td></td>
</tr>
<tr>
<td>PQQ</td>
<td>Newspaper</td>
<td>New Client</td>
<td>(add company service list)</td>
</tr>
<tr>
<td>ITT</td>
<td>Alert system</td>
<td>Existing Client</td>
<td></td>
</tr>
<tr>
<td>Framework</td>
<td></td>
<td>Repeat Business</td>
<td></td>
</tr>
</tbody>
</table>
### BID COSTS (SEPARATE SHEET)

<table>
<thead>
<tr>
<th></th>
<th>Expected Contract Value/Budget</th>
<th>Expected Margin</th>
<th>Business Target Margin</th>
<th>% Contract Values vs Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Resource Cost</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Materials</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Other Costs</td>
<td></td>
<td></td>
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<tr>
<td>Total</td>
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### TIMESCALES

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<tbody>
<tr>
<td>Bid Due Date:</td>
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<tr>
<td>Estimate Contract Award:</td>
<td></td>
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<tr>
<td>What is driving the due date?</td>
<td></td>
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<tr>
<td>Estimate Contract Start:</td>
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<tr>
<td>Contract Duration:</td>
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</tbody>
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### BID RECOMMENDATION

<table>
<thead>
<tr>
<th></th>
<th>Bid</th>
<th>No Bid</th>
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<tbody>
<tr>
<td>Reasons</td>
<td></td>
<td></td>
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</tbody>
</table>

Approved By:

### ACTIONS
## Cost Breakdown

### RESOURCES

<table>
<thead>
<tr>
<th>Grade</th>
<th>Daily Rate</th>
<th>Days</th>
<th>Cost</th>
</tr>
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<tbody>
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</tbody>
</table>

Total Resource Costs

### MATERIALS

<table>
<thead>
<tr>
<th>Material</th>
<th>Notes</th>
<th>Cost</th>
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<tbody>
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</tbody>
</table>

Total Material Costs

### OTHER COSTS

<table>
<thead>
<tr>
<th>Notes</th>
<th>Cost</th>
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<tbody>
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</tbody>
</table>

Total Other Costs
**BID ASSESSMENT**

**Criteria Scoring**
- 5 = Strong competitive advantage
- 3 = Neither strong nor weak
- 1 = Serious competitive disadvantage

<table>
<thead>
<tr>
<th>Notes</th>
<th>Scoring 0 - 5</th>
<th>Bid Stopper Y/N</th>
</tr>
</thead>
</table>

**Do we meet the basic tender requirements?**

<table>
<thead>
<tr>
<th>Requirement 1</th>
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<tbody>
<tr>
<td>Requirement 2</td>
</tr>
<tr>
<td>Requirement 3 etc.</td>
</tr>
</tbody>
</table>

Can we show relevant enough experience?

Are the requirements clearly defined and feasible?

Is the proposal and delivery time frame feasible?

Is the work a core competence of our business?

Does contract value exceed 20%-30% turnover?

Have we sufficient trading history?

Is cost a major factor in selecting the winning bid?

Are there penalties for not delivering on time/budget?

Are the contract terms and conditions acceptable?

**Internal Considerations**

<table>
<thead>
<tr>
<th>Is this opportunity aligned with our business strategy?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do we have the resources, skills and will to win?</td>
</tr>
<tr>
<td>Do we have the resources and ability to deliver?</td>
</tr>
<tr>
<td>Can we realistically manage the risks, if we win?</td>
</tr>
</tbody>
</table>
## BID ASSESSMENT

### Criteria Scoring

<table>
<thead>
<tr>
<th>Notes</th>
<th>Scoring 0 - 5</th>
<th>Bid Stopper Y/N</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 = Strong competitive advantage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 = Neither strong nor weak</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 = Serious competitive disadvantage</td>
<td></td>
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</tr>
</tbody>
</table>

If additional resources are needed, can we get what we need?

How well are we known within this business sector?

Do we have a relationship with this prospect and is it favourable?

Are partners needed, and if so, will they be easy to work with? Can we demonstrate a previous working relationship?

Do we have differentiators that will improve our chances of winning?

Can we afford the investment needed to pursue this opportunity?

Will winning put any of our existing business at risk?

Can we contractually protect our intellectual property?

### Market / Competitive Information

Do we know who the other bidders are, if any?

Is a competitor an incumbent, and does that pose a threat?

Is a competitor favoured by prospect decision makers or influencers?

Does the solution involve new or unproven technologies?

Will winning enhance our reputation in the market?

Will winning open up new market opportunities?

Will winning give us an advantage over our competitors?

### Total Score

9
<table>
<thead>
<tr>
<th>TECHNICAL ASSESSMENT</th>
<th></th>
</tr>
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<tbody>
<tr>
<td>RISKS</td>
<td></td>
</tr>
<tr>
<td>POTENTIAL FOLLOW-ON OPPORTUNITIES</td>
<td></td>
</tr>
<tr>
<td>WHO IS THE COMPETITION?</td>
<td></td>
</tr>
<tr>
<td>BID RESOURCES</td>
<td>Can we put a credible bid together in the timescale?</td>
</tr>
</tbody>
</table>
Preparing a bid plan

Managing the submission of a bid can be likened to managing a typical small project:

- There is a deadline.
- There needs to be a clear understanding of the scope.
- It involves managing resources.
- There is a process to be followed.

Therefore, like any good project a clear short planning document should be created and issued to all those involved.

The Bid Team

A successful bid team should include a mixture of individuals who can bring different perspectives and expertise to the formulation of the best solution and proposal documentation.

There are a number of key roles within a successful bid team which create the blend and expertise required for a successful proposal. An individual may fulfil one or multiple roles.

Bid team roles:

- **Bid Manager** - someone who is going to manage the tender. The individual should have the expertise to manage the entire process and have authority to make key decisions.
- **Technical Experts** - the best technical people should be involved in the design and presentation of the solution, particularly those who can bring expertise as well as new ideas.
- **The Writers** - those who are skilled at presenting clear technical and sales documentation. A number of writers may be involved, each of which should know which pieces they are responsible for and when they need to have completed the work. When each has completed their area of responsibility, their draft document should be sent to a central administrator to be added to the main proposal for review. Some larger companies may employ professional bid writers.
- **Contributors** - these may be internal or external specialist contributors who can supply additional specialist information and knowledge to the proposal, in areas such as quality, financials etc.
- **Administrators** - responsible for formatting and collating of the proposal documentation.
- **Proofreader** - usually best if a single person takes this role to ensure continuity. The proofreader should be responsible for checking the tone, flow and formatting of the overall proposal and for ensuring that key themes and business strengths are included throughout the documentation. The proofreader ideally should not have a detailed technical knowledge of the solution, so that they can read the document as if an ‘outsider’ was reading it, ensuring that technical content is easily understood.
- **Fault Finder** - someone who can pessimistically judge the bid and find areas of improvement.
Bid Kick-Off Meeting/ Brainstorming Session

Holding a bid kick-off meeting is an important initial step in the bid planning process to ensure the best bid is presented, and that the proposal is consistent and most importantly prepared on time.

Before the meeting, all relevant tender documents should be distributed to the team by the Bid Manager who should indicate which key documents each member should specifically read. The Bid Manager and at least one other nominated member of the bid team should read all the ITT documentation, including the contract.

The purpose of the bid team meeting is to:

• brainstorm the solution and approach, the delivery team and evidence that can be provided of previous experience and expertise;
• identify all the documents and information likely to be needed when writing the proposal;
• allocate different roles and responsibilities to each member of the proposal team and identify who will be responsible for contributing to each part of the document;
• create a proposal schedule including deliverables and milestones; and
• review, expand on, and brainstorm the key questions and assessment criteria used during the bid/no bid stage to formulate a number of winning bid strategies.

The team should imagine themselves as the Buyer during this process and identify all the issues and requirements in order of importance, brainstorm all the ways that the business can offer a solution and then compare these to what your competitors can provide. Can you offer greater quality, reliability, efficiency, cost-effectiveness etc? Make sure you:

• document all the strategy points for inclusion in the Bid Plan document;
• find out if there are questions about the proposal that can only be answered by the Buyer, agree who will be the key contact and how they will manage this and communicate the answers to the team; and
• review the business’s ‘Why Us?’ statements and update with relevant tender detail.

This process helps to bind the team together and motivates them to generate the best solutions and commit to submitting the work on time.
The Bid Plan
Following the bid team meeting, a Bid Plan can be created. This should contain:

A summary of the submission terms
Most tenders have clear and absolute terms for submitting a document - varying from colour of ink, font size and structure, to delivery times. These terms should be clearly listed to ensure compliance. Buyers can reject tenders on the basis of not complying with these terms without even looking at the evaluation criteria.

Bid team
Names, roles and responsibilities, timescales and contact details.

Bid timetable
Include a timetable of all tasks to be completed including key review points and the resources allocated to each. If there is a requirement to inform the tendering body that you intend to submit a tender document, make sure you do so. This will ensure that you are kept up to date with any tender changes and any clarification questions which may be asked.

Mandatory requirements list
Create a list of all mandatory and response requirements specified by the Buyer within the tender documentation. Include in this list all the returnable forms and schedules which need to be signed.

Tick off each requirement as it is included within the tender response.

The evaluation criteria
Include details of the criteria to be used during the evaluation. It is important that everyone bears these criteria in mind in completing their input.

The winning strategies
List the winning bid strategies, which have been identified as the key reasons that the Buyer should select your company for the contract. Not only should these strategies be documented as ‘Why Us?’ statements, but examples and evidence should also be brought into relevant areas of the main tender response. Equally any weak areas should be noted and ways of mitigating these identified, so they can be incorporated into the bid plan as well.
# Tools

## TENDER INFORMATION

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<th>Tenderer:</th>
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<th>Contact Name and Details:</th>
<th>Description:</th>
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## SUBMISSION INSTRUCTIONS

### Format instructions
- Document structure, font size, number of copies

### Delivery instructions
- Submission instructions, delivery date and time

## BID TEAM

<table>
<thead>
<tr>
<th>Name and Contact details</th>
<th>Responsible for</th>
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<tbody>
<tr>
<td>Bid Manager</td>
<td></td>
</tr>
<tr>
<td>Technical Team</td>
<td></td>
</tr>
<tr>
<td>Writers (optional)</td>
<td></td>
</tr>
<tr>
<td>Contributors</td>
<td></td>
</tr>
<tr>
<td>Administrators</td>
<td></td>
</tr>
<tr>
<td>Proofreader / Fault Finder</td>
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</table>
### BID KICK-OFF MEETING

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<tr>
<th>When</th>
<th>Status</th>
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**Submission**

### KEY DOCUMENT CHECKLIST

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Document 1 etc...
# Win Strategies

How can you best demonstrate that you meet the tender requirements?

What makes you different from your competitors that will benefit the client?

What is important to the client and how can you demonstrate that you will consider these values and needs in servicing the contract?

## PROPOSITION(S) TO INCLUDE

| WHO | Previous Experience | List the case studies to be included. These should demonstrate your capability in delivering/servicing projects which are as similar as possible to the work being tendered for - in terms of technical requirement, type of organisation/sector, scale, scope of work.
|     |                   | Don't forget to mention how you successfully delivered/serviced the contracts, not just what you did.
|     |                   | Where possible include client references who can be contacted by the buyer, should they wish to. |

| WHO | Team & Skills | Consider including:
|     |               | • Proposed team profiles (pen pics) and qualifications.
|     |               | • Backup resources should there be a need to cover holidays etc or if additional resource is required.
|     |               | • Recruitment and induction procedures (if you think it important).
|     |               | • On-going training provided in regulations/codes of practice.
|     |               | • Sample training plans/staff training records.
|     |               | • Security checking procedures (if relevant).
|     |               | • Job descriptions for the relevant resourcing roles.
|     |               | • Staff record keeping procedures.
|     |               | • Procedures/standards which your competitors may not be using.
|     |               | • If diversity, equal opportunity particularly important to the buyer demonstrate that your own procedures are open to all. |
### PROPOSITION(S) TO INCLUDE

<table>
<thead>
<tr>
<th>WHO</th>
<th>Technical Ability &amp; Operational Procedures</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Include a detailed description of your technical ability to deliver - assuming that the buyer knows nothing about your organisation. <strong>Presume nothing.</strong></td>
</tr>
<tr>
<td></td>
<td>Think of all the technical aspects which make you different from your competitors and highlight these differences, if relevant. Are there aspects of your solution which particularly fit in with the Buyer’s corporate values - if so, make sure you highlight them.</td>
</tr>
<tr>
<td></td>
<td>Detail your key operational procedures step-by-step. This will provide the Buyer with the confidence that they need, that you know exactly how you propose to deliver and have thought the process through carefully.</td>
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<tr>
<td></td>
<td>Highlight any methods which are different from your competitors, are particularly innovative or demonstrate efficiency.</td>
</tr>
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<table>
<thead>
<tr>
<th>COST</th>
<th>Cost/Value for Money</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Highlight any areas where you believe that your solution can offer cost savings to the Buyer. If you believe you have a better ‘longterm’ value solution which may be more expensive up-front - provide the buyer with the necessary information to backup your rationale.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HOW</th>
<th>Contract Management</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Identify all contract management roles and responsibilities.</td>
</tr>
<tr>
<td></td>
<td>Describe your proposed contract management process including project initiation, day-to-day operations, review points, quality checking dealing with issues/complaints, reporting, lines of communication, personnel, project close.</td>
</tr>
<tr>
<td></td>
<td>Describe your customer review process and provide examples.</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>HOW</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Describe your company quality systems and procedures, including copy of relevant accreditations. Provide copies of relevant quality procedures in the tender (possibly in the Appendices).</td>
</tr>
<tr>
<td></td>
<td>Describe your quality review procedures.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT IF</th>
<th>Risk</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Indicate that you have identified the risks and thought about how to reduce them by including a risk register with contingencies for all key activities.</td>
</tr>
</tbody>
</table>
## PROPOSITION(S) TO INCLUDE

| Added Value | Include any aspects of your solution which will bring something to the buyer which is beyond their existing capability - e.g.  
|            | • Can you bring additional business benefit to the Buyer's business?  
|            | • Can you bring new skills or methods in the delivering of the overall solution?  
|            | • Can you add anything extra to your solution at no extra cost?  
|            | • Can you make the overall process more efficient? Save money? |

## REASON FOR PROCUREMENT


## BID REQUIREMENTS AND EVALUATION CRITERIA


## WHAT IS IMPORTANT TO THE CLIENT?


<table>
<thead>
<tr>
<th>TITLE?</th>
<th>Proposition(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Experience</td>
<td></td>
</tr>
<tr>
<td>Team &amp; Skills</td>
<td></td>
</tr>
<tr>
<td>Technical Ability</td>
<td></td>
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<tr>
<td>Operational Procedures</td>
<td></td>
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<tr>
<td>Cost / RoI</td>
<td></td>
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<tr>
<td>Contract Management</td>
<td></td>
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<tr>
<td>Quality</td>
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<tr>
<td>Risk</td>
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<td>Added Value</td>
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<table>
<thead>
<tr>
<th>WHY US? STATEMENTS</th>
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</thead>
</table>
Writing a successful tender response

**Keep it simple, yet professional**

1. Address exactly what the Buyer asks for, and ONLY what the Buyer asks for!
2. Use a consistent writing style.
3. Be professional in the format and presentation of the response.

**Address exactly what the Buyer asks for, and ONLY what the Buyer asks for!**

When compiling your tender response, the most important thing is to do exactly as the Buyer asks, and if you are unsure of anything - ask them. Always think about what the Buyer is looking for when writing a tender, and write your response within that context.

If there is additional information that you think is relevant and you would like to include this detail place it in an Added Value or Additional Products/Services section.

Documents should be presented in a way that makes it as simple as possible for the Buyer to evaluate - if you get too sophisticated or try to be different this often will not impress the evaluation team. Don’t forget the evaluation team are specifically asking for all proposals to be presented in a consistent way to make the evaluation process easier and quicker for them to complete.

**Writing Style**

The writing style should be a combination of a formal tone used in providing the information required, and a subtle selling tone, influencing the Buyer as to why they should purchase from you. This can be a difficult mix to get right.

A style which is too ‘salesy’ will overload the Buyer with information that is often outside the scope of what they require.

Ensure that there is consistency of tense and voice (for example use of the third party). Avoid jargon and excessive use of acronyms.

**Format and Presentation**

The overall design of the proposal document makes a statement to the Buyer about the professional ability of your organisation. A simple design with a header and footer which makes the document look professional, and perhaps might include your company name or brand in the header, will make your proposal more memorable during evaluation. The footer should contain the page number and proposal title.

The document should be divided into clear sections, either as specified by the Buyer or created to provide a clear and logical presentation of the proposal content.
Throughout the document there should be a consistent font, text size, alignment and numbering sequencing used. Paragraphs should be short and punchy with bullet points and images such as simple flowcharts used to break up the text.

Appendices should be used for detailed information, removing this from the main document.

The front cover of the proposal may be the first thing the Buyer sees, and should create an impression of the quality of the remainder of the document.

The cover should clearly identify the owner by including the company corporate colours, an existing corporate ‘look and feel’ and logo. It should also include the bidder’s organisation name, title of the contract or tender and any reference codes.

Proposal Sections

There are a number of common sections in every tender document. These include:

Executive/Management Summary – summarising the main points of the tender.

Contents Table – must be included to help the bidder to easily navigate through the proposal.

Introduction – to explain the format and purpose of the tendering proposal. This should also include supplier contact details.

Understanding the Requirements – to demonstrate that you fully understand the Buyer’s business environment, the principles and values which are important to them e.g. social responsibility and sustainability, together with the specific tender requirements.

The Approach/Solution

This section may include the following:

• Step-by-step of how you propose to deliver the service/product to the Buyer.

• Who will be involved in the contract – providing a summary of their role and responsibilities. This may include a profile demonstrating their expertise and previous experience.

• Who will be involved in the management of the contract – this will usually include the contract manager, the project manager, and quality manager. Other key contacts such as support and finance will be referenced.

• How the communication will be managed between the supplier and Buyer, including contract initiation, review check points, regular reporting and closure/handover.

• How you will ensure continuity of service.

Pricing

Buyers will usually specify the exact pricing information to be included in the proposal and how it should be presented. Normally this will take the form of a table or spreadsheet, requiring a detailed breakdown of the cost elements to be provided and an indication of how they are calculated.
As well as the total price, suppliers may be asked to provide costs on:

- specific stages or parts of the work – as this level of breakdown may be required during evaluation;
- specific hourly or daily rates for individuals working on the project; and
- estimated costs of subsistence and expenses.

When presenting the price make it clear whether it includes VAT or not and, if exchange rates are involved, which rate has been used in the calculation.

The calculation of the project pricing should be thought out very carefully and should be set or reviewed by a representative within the business with financial responsibilities. Once submitted the business is contractually bound by these prices.

When preparing the financial costings for the proposal, there may be details on which you have to make assumptions. You should list these assumptions within the pricing section so the Buyer is aware of them, reducing misunderstandings.

Other Information

Company introduction – explaining what your company does and the services and products it provides, how long it has been in operation, company organisation chart, ethos of the company. Spend time on this – this is your chance to sell the strengths of your company.

Case studies/Customer references – can be used to demonstrate that your business has provided similar services/products to other organisations, which, if required, may be approached to vouch for the quality of service. The case study projects should be in a consistent format. You can develop a template for these.

Staff CVs – Buyers need to know that your business has the right skills and experience within the team to deliver the contract. This can be demonstrated by providing a short pen pic of each member of the team within the body of the proposal with full CVs attached in an appendix.

Added value – Buyers will often ask how your business can add to the contract. This might include any additional services/products which will enhance the overall solution or provide better value for money.

Alternative offers – if you believe that there is better solution than the one proposed in the tender documents, include this as a separate section from your main offer which must respond to the specifications in the documentation.

Why Us? – summary points of why the Buyer should choose your company over the competition. Sum up your bid, explaining succinctly why it meets all the client’s needs and why your company is best placed to undertake the work, or provide the service.
These points should be a series of short statements consisting of one or two sentences, outlining:

- an endorsement which makes you stand out;
- an advantage over your competitors;
- a compelling argument; and
- a conclusive reason why the Buyer should select you.

**Examples**

- We are the only UK contractors that have done this type of work before.
- Our safety record within this industry has been recognised by five gold awards.
- Our manufacturing facilities and procedures demonstrate performance in excess of the ITT requirements.
- Our approach has been developed through many years’ experience of working within the industry and includes a number of tried and tested alternative methods, should problems arise.

**Standards and policies** – most tenders require the supplier to adhere to industry standards, business laws and regulations. In order to demonstrate compliance, your business has to have certain standards, policy statements and certifications in place.

The following policies are commonly requested:

- Environmental Policy
- Sustainability Policy
- Fair Employment Policy
- Health & Safety Policy
- Certificates supporting technical capability
- Quality

If your business does not have the required standards and policies in place, you may have to think ‘outside the box’. The reality is that many businesses are actually adhering to these standards and policies, and they are hidden within their normal operational procedures.

**Commercial sensitivity** – under the Freedom of Information Act 2000, any tenders or documents submitted and associated letters and emails are subject to the FOIA. A separate Freedom of Information form is often enclosed as part of the tender document pack. Mark clearly the sections which contain information you consider confidential and include a line to justify your selection and also state for how long the selected information is likely to remain confidential.

**Review Cycle and Sign Off**

It is vitally important to review your proposal at regular intervals during its preparation for content, sense, readability and flow. The nominated proofreader should ideally be someone who has not been directly involved in the tender preparation and can review it as if they were the Buyer.

Allow enough time in the tender timetable for review points and follow-on actions to be incorporated.

An appointed person within your business should sign off the tender. This person should be regularly informed of progress, the costs estimates and any identified risks.
Submission

When tendering you are always given a clear deadline by the Buyer for providing the required information and documents. This deadline is extremely important and missing it will simply mean that you will be disqualified.

In order to prevent such a disaster, do not leave things to the last minute. Plan the process well and make sure that you allow for all potential problems, such as ensuring all files are safely stored and backed up and printers are working and have a sufficient stock of ink or toner.

Submitting Hard Copy Tender Documentation

If a hard copy proposal is required, it is vital to precisely follow the delivery instructions – where the tender should be sent, the number of copies required and any packaging instructions.

Often, Buyers will specify that the proposal documents be presented in an unmarked envelope containing no company identification such as company stamps or logo. Be careful if using a company franking machine that the franking machine does not contain the company name. Failure to comply with the correct packaging instructions will lead to disqualification of your company, without your tender response ever having been read.

Delivering the tender package may be as simple as driving to the Buyer’s address to hand in the tender, or it could involve flying it to a different country. If local, the most dependable method of delivery is by using a member of the bid team to take the package personally to the delivery address. When left at the Buyer’s office, always obtain an official signed receipt with the date and time of delivery recorded.

If the delivery address is outside your local area, use a reliable special delivery service or courier service which requires a signed receipt. Make sure you are aware of the delivery times required and always add a contingency margin. If delivering overseas, factor in plenty of time for the delivery, just in case.
Submitting Electronically

Increasingly, more Buyers, particularly in the public sector, are requiring that suppliers submit their proposals electronically either by email or via a tendering portal.

Tendering portals enforce a rigid delivery structure on the submission, with much of the information being provided via yes/no responses to specific questions, or free form information boxes, often restricted by a limit on the number of words allowed. Additional documents can be uploaded but are kept to a minimum. Buyers like the e-tendering method as it tends to keep responses consistent and to the point and as such easier to evaluate.

If you are submitting using a tender portal:

• Make sure you know how to use the system well ahead of the submission date.
• Check any word limitations.
• As larger documents take longer to upload, start with them first.
• Save, save and save again.
• Tender portals for security reasons usually time out after 15 minutes of being dormant. Make sure to hit save as soon as you have uploaded your latest documents.
• Keep checking that everything has been uploaded successfully.
• Don’t forget to print/save a copy of your electronic submission for your records. Once the tender has been submitted to the Buyer, the supplier is often unable to access it again.
# TENDER REGISTER

<table>
<thead>
<tr>
<th>Date</th>
<th>Source</th>
<th>Tenderer</th>
<th>Contract Title</th>
<th>Bid/No Bid</th>
<th>Bid Outcome</th>
<th>Value</th>
<th>Contract Period</th>
<th>Awarded to</th>
<th>Actions</th>
</tr>
</thead>
</table>

**Company:**

**Register Period:**

**Managed By:**

**Tender sources:** (list)

**Total No Bid:**

**Total Bid:**

**Success Rate:**
The Tender Process

Post submission

Although you've now submitted your tender... the work's not over yet!

Tender Evaluation

The tender documentation usually indicates the timescale involved in the awarding of the contract and contract start date.

Don’t be surprised, however, if a deadline slips, it can happen.

Be patient, and avoid pestering the Buyer after the expected award date. This will not help you. Remember the Buyer will be adhering to their internal procurement processes which require them to notify the participants in writing immediately after the decision has been made, so do not worry that you will not be informed.

Depending on the complexity of the tender and number of applicants, the evaluation process can take time. But be assured that it will be undertaken in a very systematic and thorough way, ensuring that the best supplier is selected and that the unsuccessful applicants have a clear understanding of why they were unsuccessful.

Internal Debrief Meeting

It is easy the ignore this step, as you are so often relieved just to have finished the proposal, but, it is important to be continuously improving the quality of your bids and processes to make the tendering process easier in the future. It is best to have this review before the contract is awarded as it will be uninfluenced by the outcome.

This is also an opportunity to thank the team - win or lose, they will have put a lot of hard work into the tender often under stressful time constrictions.

A tender closure form can be helpful. This details a number of key parameters and can be used to provide a thorough and consistent assessment. Actions can be documented on this form and signed off when completed. See tender register detailed earlier.
Presentations/Interviews/ Site Visits

During the evaluation period, Buyers may ask to visit the supplier’s premises, or for suppliers to attend an interview or to present their ideas. This is usually because they would like to meet the team, or inspect a product or operating environment.

The Buyer will usually provide a detailed agenda in advance stating what they would like to see and who they would like to meet and particular areas they would like the supplier to present or discuss.

Preparation is key. You should make sure that you have the right team available, that you are clear as to who is best positioned to talk about the various topic areas, and that there is a common consensus on the proposed solution and methodology within the team. Avoid any potential personality or technical clashes within the team – you need to be portraying the image of a united, professional organisation. Answers to potential questions should be rehearsed, to ensure that they can be fully and clearly explained.

If a formal presentation has been requested, nominate a presentation leader to develop the overall structure of the presentation, co-ordinate the content and contributions of the individual participants, organise the rehearsals and pre-presentation briefings, and on the day to manage the logistics of the presentation and introduce the members of the supplier team to the Buyer.

During presentation rehearsals, ask at least one member of the team to play the role of the Buyer, ensuring all areas are covered in a clear and consistent way and that the presentation team are working well together.

Key Considerations

- Keep the presentation precise using the bid executive summary as a guide.
- The sub-headings outlined in the summary should be presented as the main presentation topics and presented in a logical order.
- Do not cut and paste text directly from the tender documentation – provide the main points as bullets and talk around them.
- Remember you cannot introduce new ideas into the presentation, however, you may expand on areas that were included within the tender.
- Allow time for questions after each presentation topic. The Buyer may prefer to wait to the end or they may prefer to pause after each topic.
- Presentations should not be delivered necessarily by a sales person, but by the delivery team. The evaluation team will understand that making presentations may not be something the team do regularly.
- Prepare a good final statement, which should focus on the messages that are at the centre of your proposal – leave the Buyer with a lasting impression.
- Print a copy of the presentation as an aid to the Buyer and as something which can be taken away. This also can be used as a back-up should there be any technical hitches!
The Tender Process

If the Buyer has requested a site visit, ensure that all areas of your site are well presented – clean, tidy and well-organised. If the Buyer is there to inspect certain equipment or facilities, test everything beforehand to ensure that everything is functioning correctly. Think about all legislative standards and requirements, for example, health and safety certificates and procedures, certifications etc. and make sure that the right systems and paperwork are in place and up to date and can be shown to the Buyer.

The Buyer, as well as being able to meet key staff through a site visit, will be looking for evidence that what you have described in your tender document is actually happening on a day-to-day basis, and that the environment portrays the image of a professional organisation which they are happy to do business with.

Procurement is about a long-term relationship between the Buyer and supplier and face-to-face meetings via an interview or presentation is a way of evaluating if you can work together and for the Buyer to be able to judge the professionalism and quality of the people who will be involved on the project.

Evaluation Feedback

Suppliers will receive notification of the contract award by letter.

Following notification, it is possible to obtain evaluation feedback from the Buyer. You can request this in written form, or via a face-to-face meeting or telephone call.

Whether you have been successful or unsuccessful, obtaining constructive feedback from the Buyer is an important opportunity to get information about how you can improve your performance in the future. If practical, and agreed to by the Buyer, it is best to meet the Buyer face-to-face as this gives more of an opportunity for you to ask questions and to potentially build a relationship for the future.

The feedback process can also help the Buyer, as it allows you to bring to their attention any problems or unclear areas that may have arisen during the procurement process which they can feed back into their processes.

The post-evaluation information provided by the Buyer usually takes the form of a table detailing under each criterion your score and the maximum score awarded. Comments are also provided against each criterion providing you with useful areas for improvement.

Finally, your overall score will be provided, the score of the supplier that has been awarded the contract and the position you were placed in the final scoring.
Complaints Process
Anyone who has been unsuccessful and feels aggrieved for any reason can challenge the Buyer’s decision on the contract award within the standstill period. The complaint should be presented in writing to the main Buyer contact, clearly stating the nature of the complaint. The Buyer will have a process in place to deal with any complaints it receives and the business should receive a response from the Buyer quickly. However, if no response is received the complaint should then be escalated quickly to the tendering body Head of Procurement.

Updating the Bid Repository and Documentation
Your ability to complete tenders quickly and efficiently will improve significantly if you maintain well organised and up-to-date generic information for example, CVs, company background, case studies. At the end of the tender process, you should update your bid repository with the latest version of this information which may be reused in future bids. Try to work on the principle: create once and use many times.

Tools
De-brief/feedback form should be held on file for future reference.