

Tender Preparation & Evaluation

A practical and interactive training course for all those involved in writing and evaluating Requests for Proposals (RFPs), Invitations to Tender (ITTs), Requests for Offers (RFOs) or Request for Bids (RFBs) for goods and services

by



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13-14 February 2011
Sheraton Karachi Hotel

16-17 February 2011
Pearl Continental Hotel, Lahore

9:00 am to 5:00 pm



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Introduction

The price you have to charge for your goods and services is largely determined by the price you pay your suppliers. In the public sector, the volume and quality of services you provide to the public for a given budget depends on how much you pay your suppliers.

Over half of all outsourcing contracts and up to thirty per cent of other supplier contracts involve dispute: and the causes for dispute invariably go back to the detail of the tender and its associated contract and service level agreement. This can affect the profitability, reputation, market share and image of the customer.

Tenders can result in buying the wrong service or product at the wrong price – and that can seriously harm the health of the customer organization. Suppliers and buyers: avoid mistakes in tenders, show best practice and create winning tenders by attending the Tender Preparation and Evaluation course. Getting the scope, specification, Statement of Work (SoW) or Service Level Agreement (SLA) right is crucial but only part of the overall process of writing documents to suppliers, calling for their proposals or bids. The course demystifies the process and provides guidance to developing truly effective tenders that make for better vendor evaluation and selection and facilitate ongoing contract management.

The offers received for work will reflect the quality and clarity of the information provided in the tender documentation so it is essential that tender documents are prepared correctly and comprehensively. The course is designed to teach the best techniques for successful service procurement. The focus will be on using best practice to pick the right supplier for the right reasons and get the right deal in order to maximize business leverage from your tenders.

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Key Learning Objectives

1. **Enhance** your service procurement skills
2. **Learn** best practice and select the right supplier for the right reasons
3. **Ensure** you achieve the right deal
4. **Maximize** business leverage from tenders
5. **Become** an asset to the tender presentation/selection team of your organisation
6. **Discover** essential service procurement and tendering tools and techniques
7. **Drive** profitable financial decision-making within your firm
8. **Suppliers:** learn how buyers select or reject you

Course Outline Day I

Planning the Procurement Lifecycle

Planning the Tender Stages

-What to do before you go to Market

Exercise: Identifying and developing the skills needed for a successful tender

- Definitions: bids, tenders, RFPs, RFQs, ITTs, RFOs, RFls - what are they and what's the difference?
- Purchasing and supply management
- Let's talk business: how effective tendering supports business success
- The procurement process understanding the buying cycle and the selling cycle
- Procurement strategies
- E-sourcing and e-procurement
- Private finance initiative (public private partnership) - challenges and contract types
- Pre-tender activity
 - Information gathering and environmental scanning
 - Identifying suppliers
 - Analysing supplier's capabilities and creating a supplier profile
 - Preferred vendor lists and shortlists
- Types of tenders and proposals
- Sole source, open and restricted tenders
- Requests for registration of interest: PINs, PQQs and RFls
- The evolution of a tender:
 - Vendor-customer cooperative proposals
 - Budgetary, formal and informal proposals
- Tender compliance - but how far?
- Contract duration

Developing Effective Communication Strategies

The Right Approach

Targeting and Profiling the Service

- The people issues: tender skills
- Developing tender strategies and plans
- Cost benefit analysis and evaluation criteria
- Value, cost and risk
- Measuring value: cash value; Social Return on Investment (SROI); sustainable purchasing and Value for Money (V4\$ or VFM)
- Think like the supplier
- Creating a win/win tender

- How good tenders simplify the vendor evaluation process
- Tender contents
- Tender pitfalls

Case study: tender compliance and common irregularities

- Getting the specification (Statement of Work) right
- Proposal pitfalls - vendor
- Managing tender and contract risk
 - Risk success factors
 - Risks in construction contracts

Developing Cost and Service Profiles and Base-Lining Drafting the Tender Document or Market Package

The Tender Roadmap

- Stakeholders in the tender process - their roles and responsibilities
- Understanding needs and expectations of internal customers
- The bid cycle: stages of vendor response and bidding
- Managing contracts for projects
- Why project contracts fail: how to avoid failure

Case study: the tendering process in an oil major

- Oil industry best practice
- Designing acceptance criteria
- Interpreting proposals
- Full and final offer
- The tender team: the core team and support roles
- One person tender teams
- Tender teams for PFI
- Roles in proposal evaluation

Course Outline Day 2

Tender Documents: The Devil is in the Detail Designing Optimal Evaluation Criteria Managing Exposure: Effective Risk Management

Facilitating the Best Responses To The Tender Applying Due Diligence to Ensure Viability of the Supplier, the Bid and the Contract

- Preparing the essential information
 - Technical data
 - Management information
 - Commercial and pricing information
 - Cost of ownership and cost/benefit issues
 - Legal or compliance issues
 - Security requirements
 - Evaluation and selection criteria
 - Negotiation strategy and tactics
- Pricing structures; financial checklists, costs and allocation
- Full and final offer
- Managing risk
- Tender structure, content and format

- Covering letter, executive summary, body and appendices - balance; who should write what?
- Tender standards
 - Use of templates
 - Style, language and presentation
 - Electronic tenders
 - Translation issues - scope for discrepancies?
- Content: the vital messages
- Alternative offers and creative solutions - or customer confusion?
- Tender pitfalls - how to avoid them
- Tender reviewing team and one-person proposals
- Buyer behaviour and the decision making unit
- Tender evaluation: MEAT & AQSCIR

***Scoring and evaluation issues: example evaluations**

Conditions, Specifications and Service Level Agreements

Post-Tender Activities

Debriefing the Losing Tenderers

Putting It All Together in the Best Procurement and Tendering Plan

- Quality standards: ISO 9000
- How to specify the requirement
- Service levels and support issues
- What makes good and bad service level metrics
- Quality in dynamic environments
- Performance and throughput criteria: quality vs utilisation variability
- Issues of technological obsolescence and residual values
- Whose terms and conditions?
- Challenging supplier terms and conditions

Providing Vendor Feedback

Tender And Contract Management Maturity Levels

Summary: The Contract Management Process

- Stage 1: Pre-Award
 - Procurement planning
 - Solicitation planning
 - Solicitation
- Stage 2: Award
 - The role of specialist purchasing staff and the role of the technical expert: the decision making unit and the decision cycle
 - Negotiation issues
 - Advising successful and unsuccessful bidders
 - Contractual aspects
- Stage 3: Post-Award
 - Creating a sound contract management structure
 - Key elements in supplier management
- Contracts - the essential clauses
- Managing the contractual relationship - enforcement and dispute resolution
- Supplier performance measurement and management
- Aligning vendors with business mission achievement: the balanced scorecard and the vendor

Meet Your Expert Course Leader



ANDREW HILES

Director
Kingswell International

Andrew Hiles is a director of Kingswell International (www.kingswell.net). He has had over 25 years' experience as a customer developing tenders and evaluating high value proposals; as a service provider (including a spell as an outsourcing service provider). His responsibilities included developing and submitting tenders and proposals. As a consultant He has helped customers to develop effective tenders, service level agreements and contracts and supporting suppliers in developing proposals and in the bid process. He was the founder and first Fellow of the Business Continuity Institute and a Member of the British Computer Society.

Andrew's books are used by universities and practitioners around the world. He is the author of: The Complete Guide to IT Service Level Agreements, Matching Service Quality to Business Needs. ISBN 0-9641648-2-5; Service Level Agreements, Winning a Competitive Edge for Supply and Support Services. ISBN 0-9641648-4-1 (a National Contract Management Association Book of the Month); E-Business Service Level Agreements: Strategies for Service Providers & E-Business Professionals, ISBN 0-9641648-9-2 all published by Rothstein Associates Inc. (www.rothstein.com). Andrew contributed to Qatar Finance - The Ultimate Resource (QFINANCE) published by Bloomsbury and to Croner's Guide to Purchasing. His top-selling software packages, "Tendering Framework" and "SLA Framework", are used by leading international companies.

He has helped public and private organisations develop effective procurement policies and handle relations between supplier and customers, including design of tenders and evaluation of vendors; RFP evaluation for vendors; bid management; proposal design; contract management and dispute resolution. He has presented at Cranfield, Henley, Ashbridge and GEC Management Colleges and at numerous workshops and conferences in the Middle East (for over 10 years), India, China, Europe, Africa, the Pacific Rim and Australasia and the Americas.

Who should attend?

This course is designed for

- Managers
- Coordinators
- Supervisors
- Engineers
- Assistants
- Officers
- Administrators

Responsible For

- Tenders
- Contracts
- Procurement
- Purchasing
- Supply
- Projects / Project Management
- Planning
- Operations
- Construction
- Technical Support



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