

# Tender Preparation And 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 Requests for Bids (RFB) for goods and services

27 September – 1 October 2009

Dusit Thani Hotel, Dubai, UAE

## Attending This Innovative Training Course Will Enable You To:

- **Enhance** your service procurement skills
- **Learn** best practice for picking the right supplier for the right reasons
- **Ensure** you achieve the right deal
- **Maximise** business leverage from tenders
- **Become** an asset to the tender presentation/selection team of your organisation
- **Discover** essential service procurement and/or tendering tools and techniques

### Why You Should Attend

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 organisation. Avoid mistakes in tenders, show best practice and create winning tenders by attending this valuable training course.

### Who Should Attend:

This course is designed for Managers, Coordinators, Supervisors, Engineers, Assistants, Officers and Administrators responsible for:

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

Includes Free  
ITT Framework CD  
US\$ 295 Value!



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## Course Timings

Registration for this course will be at 8:00 with a prompt start at 8:30. Refreshments will be served at appropriate intervals. Lunch will be served at 14:30 following close of each day.

## Day One – Sunday, 27 September 2009

### Planning The Procurement Lifecycle

### Planning The Tender Stages – What To Do Before You Go To Market

### Identifying And Developing The Skills Needed For A Successful Tender Exercise

- Definitions: bids, tenders, RFPs, RFQs, ITTs, RFOs, RFIs – 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 RFIs
- The evolution of a tender:
  - Vendor-customer cooperative proposals
  - Budgetary, formal and informal proposals
- Tender compliance – but how far?
- Contract duration

## Day Two – Monday, 28 September 2009

### 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

### Group Exercises

## Day Three – Tuesday, 29 September 2009

### 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

## Day Four – Wednesday, 30 September 2009

### 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

### Group Exercises

## Day Five – Thursday, 1 October 2009

### 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

#### Roundup And Delegate Action Plan

### Group Exercises

**Note: The content and running order may be changed to reflect delegates' interests**

## Meet Your Expert Course Leader



**Andrew Hiles**, BA, FBCI, MBCS, has had over 25 years experience as a customer developing tenders and evaluating high value proposals; as a service provider, submitting proposals; and as a consultant assisting customers to develop effective tenders and supporting suppliers in developing proposals

and in the bid process. His purchasing and sales background spans some 25 years and he is a frequent speaker and consultant on all aspects of negotiating and buying. He contributed to Croner's Guide to Purchasing and has written three books on Service Level Agreements, published by Rothstein Associates Inc.

Starting his career with the Royal Air Force in programming and systems, Andrew moved to London Transport in an operational role. Later, in their Central Productivity Unit and subsequently as IT Projects Manager and as Manager of the Business Process Re-engineering function, he led several major technical and organisational reviews involving the reorganisation of key functions of London Transport. From there he moved to the Post Office as their first Business Systems Consultant with responsibilities for major projects involving acquisition of IT equipment and services. Andrew designed and drafted tenders for a rolling project portfolio of over \$20m.

Andrew is a Director of Kingswell International Limited - an international consultancy specialising in delivering service and managing business risk.

### Hear What Past Delegates Have Said About The Previous Course:

*"Good professional information."*

**Mohammed Al-Muhairi**, Assistant Admin & Procurement Officer  
Abu Dhabi Council for Economic Development, UAE

*"I learned a lot. There was a lot of new information and many examples."*

**Mohamed Abd El Maksoud**, Project Manager  
Al Ahly Real Estate Development, Egypt

## Forthcoming Relevant Events

BC3092 **Purchasing And Procurement Masterclass**  
2 – 6 August 2009

[www.iirme.com/purchase](http://www.iirme.com/purchase)

BC3147 **Contract Risk Management And Dispute Resolution**  
2 – 6 August 2009

[www.iirme.com/dispute](http://www.iirme.com/dispute)

BC3173 **Service Level Agreements And IT Contracts**  
4 – 8 October 2009

[www.iirme.com/itsla](http://www.iirme.com/itsla)

For more information on any of the above events please contact us on Tel: 971-4-3352483 or email: [r.devnani@iirme.com](mailto:r.devnani@iirme.com)

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Yes, I want to register for:

Event	Dates	Price before 21 June 2009	Price between 21 June and 19 July 2009	Price after 19 July 2009
<input type="checkbox"/> Tender Preparation And Evaluation	27 September – 1 October 2009	US\$ 3,795 (Save US\$ 500)	US\$ 4,095 (Save US\$ 200)	US\$ 4,295

Course fees include documentation, luncheon and refreshments. Delegates who attend all sessions will receive a Certificate of Attendance.

**Interested in running this course in-house?**

Please call the Customised Training Solutions Team on 971-4-3352439 or [CTS@iirme.com](mailto:CTS@iirme.com)



### PERSONAL DETAILS:

	Title	First Name	Surname	Job Title	Department	Email	Mobile
1 <sup>st</sup> Delegate							
2 <sup>nd</sup> Delegate							
3 <sup>rd</sup> Delegate							
4 <sup>th</sup> Delegate							

To assist us with future correspondence, please supply the following details:

Head of Department							
Training Manager							
Booking Contact							

Company: .....  
 Address (if different from label above): .....  
 ..... Postcode: ..... Country: .....  
 Tel: ..... Fax: .....  
 No. of employees on your site:  
 0-49  50-249  250-499  500-999  1000+  
 Nature of your company's business: .....

Yes! I would like to receive information about future events & services via email.

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### Payments

A confirmation letter and invoice will be sent upon receipt of your registration. **Please note that full payment must be made upon receipt of the invoice and prior to the event.** Only those delegates whose fees have been paid in full will be admitted to the event. You can pay by company cheques or bankers draft in Dirhams or US\$. Please note that all US\$ cheques and drafts should be drawn on a New York bank and an extra amount of US\$ 6 per payment should be added to cover bank clearing charges. All payments should be made in favour of IIR Holdings Ltd.

### Card Payment

Please charge my credit card:  Visa  Mastercard  American Express

Name on Card: .....

Card Number: ..... Exp. Date: .....

Signature: .....

### Cancellation

If you are unable to attend, a substitute delegate will be welcome in your place. If this is not suitable, a US\$ 200 service charge will be payable. Registrations cancelled less than seven days before the event must be paid in full.

### Avoid Visa Delays – Book Now

Delegates requiring visas should contact the hotel they wish to stay at directly, as soon as possible. Visas for non-GCC nationals may take several weeks to process.

*Due to unforeseen circumstances, the programme may change and IIR reserves the right to alter the venue and/or speakers.*

### Event Venue

**Dusit Thani Hotel, Dubai, UAE**

Tel: 971-4-343333

### Accommodation Details

We highly recommend you secure your room reservation at the earliest to avoid last minute inconvenience. You can contact the IIR Hospitality Desk for assistance on:

Tel: 971-4-4072693

Fax: 971-4-4072517

Email: [hospitality@iirme.com](mailto:hospitality@iirme.com)

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