

Tender Preparation & Evaluation

Course Outline

Day One

Planning the Tender Lifecycle

Maximising Bargaining Power into the Tender

Identifying and Developing the Skills Needed For a Successful Tender Exercise

- What is a tender?
 - RFPs, ITTs, RFOs, RFIs – what's the difference?
 - The evolution of a tender:
 - Vendor-customer cooperative proposals
 - Budgetary, formal and informal proposals
 - Requests for registration of interest
 - Tender compliance - but how far?
 - Analysing supplier's capabilities
 - Contract duration
 - Creating a win/win RFP
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Day Two

Developing Effective Communication Strategies

Targeting, Profiling and the Right Approach

Targeting and Profiling the Service

- Think like the supplier!
- Understanding the buying cycle and the selling cycle
- Developing tender strategies and plans
- Information gathering and environmental scanning
- Identifying suppliers
- Preferred vendor lists and shortlists
- Stages of vendor response and bidding
- Designing acceptance criteria
- Interpreting proposals
- Full and final offer

- How good tenders simplify the vendor evaluation process
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Day Three

Developing Cost and Service Profiles, And Baseline

Planning the Tender Stages – What To Do Before You Go To Market

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 tender team: the core team and support roles
- One person tender teams
- Tender teams for PFI
- Roles in proposal evaluation

Preparing the Essential Information

- Technical data
 - Management information
 - Commercial and pricing information
 - Cost of ownership and cost / benefit issues
 - Legal and compliance issues
 - Security requirements
 - Evaluation and selection criteria
 - Negotiation strategy and tactics
 - RFP structure, content and format
 - Covering letter, executive summary, body and appendices - balance; who should write what?
 - RFP Standards
 - Use of templates
 - Style, language and presentation
 - Electronic RFPs
 - 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
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Day Four

Designing Optimal Evaluation Criteria

Facilitating the Best Responses to the Tender

Applying Due Diligence to Ensure Viability of the Supplier, the Bid and the Contract

Managing Exposure: Conditions, Specifications and Service Level Agreements

- Quality standards: BS 5750 & 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. utilization variability
 - PFI challenges – PFI types and risk sharing
 - Issues of technological obsolescence and residual values
 - Whose terms and conditions?
 - Challenging supplier terms and conditions
 - Managing risk
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Day Five

Debriefing the Losing Tenderers

Putting It All Together In the Best Procurement and Tendering Plan

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

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