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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

4 – 7 December 2011 • Media Rotana Hotel, Dubai, UAE

OFFICIAL REGIONAL
RECRUITMENT PARTNER



7 Key Learning Objectives

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

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Course Timings Registration for this course will be at 7:30 on Day One. All four days will commence at 8:00 and conclude at 14:30. Refreshments will be served at appropriate intervals and lunch will be served at the end of each day's sessions.

Course Introduction

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 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 maximise business leverage from your tenders.

Course Outline

Day One

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, 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

Developing Effective Communication Strategies

The Right Approach

Day Two

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

Would You Like To
Run This Course
In-House?



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Customised Training Solutions is the in-house training division of IIR Middle East.

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Day Three

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

Day Four

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 Your Action Plan

Group Exercises

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

Meet Your Expert Course Director

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. He is a frequent speaker and consultant on all aspects of negotiating and buying.



After starting his career with the Royal Air Force, 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. 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. 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.


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.


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FIVE WAYS TO REGISTER

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DISCOUNTS AVAILABLE FOR 2 OR MORE PEOPLE

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Event	Course Fee Before 25 September 2011	Course Fee Before 23 October 2011	Final Fee
Tender Preparation And Evaluation 4 – 7 December 2011	US\$ 3,695	US\$ 4,195	US\$ 4,495

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

BC4304



Interested in running this course in-house?
Please call the Customised Training Solutions Team
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All registrations are subject to our terms and conditions which are available at www.iirme.com/terms. Please read them as they include important information. By submitting your registration you agree to be bound by the terms and conditions in full.

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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 received 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. In any event payment must be received not later than 48 hours before the Event. Entry to the Event may be refused if payment in full is not received.

Credit card payment

If you would like to pay by credit card, please tick here and a member of our team will contact you to take the details

Cancellation

If you are unable to attend, a substitute delegate will be welcome in your place. Registrations cancelled more than 7 days before the Event are subject to a \$200 administration charge. Registration fees for registrations cancelled 7 days or less before the Event must be paid in full. Substitutions are welcome at any time.

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.

All registrations are subject to acceptance by IIR which will be confirmed to you in writing.

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

Event Venue:

Media Rotana Hotel, Dubai, UAE
Tel: 971-4-4350000

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
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