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1. Is your business ready?

- Regularly review your business position and strategies to assess if tendering is the right approach for your business now, before making a serious commitment.
- Identify business strengths and weaknesses.
- Identify actions to be taken to close any gaps.

Businesses should be very honest with themselves at this stage; it is better to be patient and wait until the business is ready rather than waste valuable resources.

2. Be prepared

- Familiarise yourself with the procurement processes commonly used within your sector and by the tendering bodies you wish to target. By doing so, you will gain knowledge of the different processes and what is expected, and this will help you to make an informed decision regarding whether to bid or not.
- Understand your business strengths and weaknesses - it is important that you communicate your strengths.
- Identify, research and focus on specific target markets. Whether these are geographical, types of Buyers, or specific sectors.
- Understand the specific Buyer requirements - doing this ahead of time.
- Create an in-house tendering data repository - creating a comprehensive library of key tendering information will save considerable time and effort during the tendering process. Information that can be stored includes:
 - Staffing details - pen pics and CVs
 - Company background data
 - Company policy documents
 - Technical specifications
 - Quality statements and procedures
 - Case studies
 - Key financial data
 - Copies of previous proposals

Once established, the tendering repository should always be kept up to date as part of the tendering closure process and at regular periods through the year.

- Identify an in-house bid team.
- Build a tender awareness system.
 - Take time to explore which websites are relevant to the type of contracts you are interested in. Create a list of these websites/sources and find the most efficient system to ensure that you are notified of all relevant opportunities.
 - Many of the internet sites advertising contracts offer a daily e-mail alert system, sometimes for free. Register for alerts as it will save you time and effort in searching on a regular basis and will ensure you never miss any opportunity.

- If the website does not offer a free alert system, consider which is the best approach to be kept up to date, either by allocating responsibility to a member of staff to regularly scan relevant websites for new opportunities or to register with a commercial tendering company which offers an alert system for an annual fee (usually between £250 and £750).
- Be aware that some organisations may not advertise lower-value contracts at all. So do not rely only on tenders as the 'way in' to larger organisations. You may also benefit from identifying the appropriate person in an organisation and providing them with information about your business, via telephone, e-mail or letter.
- Create a tender register - this will allow you to monitor key tender information and sources, the internal bid/no bid decisions and reasons, the outcome if you decided to bid, key contract information such as value, who won and duration. This document can be very useful when regularly reviewing the business tendering strategy, to assess your success rate, and reasons why no bid decisions were made etc.
- Monitor awarded contract information - by knowing who is winning the contracts, even those you decide not to go for, you will be able to find valuable market/competitor information. Also you may be able to identify a sub-contractor opportunity.

For further information on Tender sites, contact the Business Information Centre at Invest NI: Tel 028 9069 8135.

3. Bid or No Bid

Select which tenders to respond to CAREFULLY.

- **Be realistic** and don't try to be too ambitious - don't forget preparing a tender proposal is a very time-consuming (and costly) process!
- Look very carefully at the requirement/specification and ask yourself - **can you meet the main requirements?** Is it appropriate for you to undertake the contract, for example would it put too much financial or other pressure on your organisation?
- Do you know who the incumbent supplier is? If so, can you find out what the **current pricing arrangement** is? Is this within your proposed price range that will ensure that you make money on the contract? The purchaser may pay a little more but will be looking for some added value.
- If your business is an SME, ask yourself if you could appear bigger and demonstrate more experience if you **partnered** with another SME. If so, who would that be and who is best to lead the proposal?
- Don't be afraid to clarify any of the requirements or **ask the nominated purchasing contact questions.**

4. Prepare a bid plan

- At the outset, **read the full tender documentation extremely CAREFULLY** and understand the full extent of what needs to be completed, by whom and by when.
- Establish the **roles and responsibilities** of all who should be involved and delegate activities to the best people to help you within your organisation. For example, decide who is best to help you gather the quality/financial information, who is best to do the final formatting of the document.
- Prepare a detailed **timeline** of activities required to complete the proposal, and send it to all relevant parties with clear deadlines, and keep reviewing it!

Within the public sector the tender documentation tends to be fairly standard, but there is a lot of it. The amount of paperwork often puts suppliers off, but if you can spend the time reading and understanding the format, it will make sense, and don't forget, the next time it will be a lot easier.

- Never, **never underestimate the time required** to complete your proposal - no matter how well you feel you have the process planned, problems will occur so leave yourself as much time as possible.
- Think of all the things that might go wrong. What if someone key to preparing the bid is sick? Have you enough printing materials? Think ahead and make any necessary **contingency arrangements**.

5. Focus on what the Buyer wants

- **Always keep the Buyer in mind** when writing your proposal - talk about their needs and how you can solve their problems and how you have the skills, products and experience to fulfil their requirements.
- Find out as much as you can about the organisation that you are tendering to, if you don't know them. Understand what their **organisational objectives** are, their values and include a section in your tender response letting them know that you are aware of their future developments and how you as a supplier will potentially be able to help them to achieve these objectives.
- Specifically demonstrate that you **understand the requirements** of the work - provide plenty of examples of similar work you have completed and your relevant skills and experience.
- Prepare your response in line with the **evaluation criteria** and weighting, concentrating on areas with the highest percentage.
- Don't forget to demonstrate your '**added value**' (i.e. what benefits you can bring in addition to those specifically asked for). Make sure though that you meet the core requirements and standards.
- Keep your **competitors** in mind when you are writing the proposal and ensure that you can demonstrate greater value for money than they can.
- Show you've thought about - and can manage - potential financial, commercial and legal risks that could cause contract failure.
- **Ask questions** - if you need to clarify any of the requirements, e-mail your question to the purchasing contact and they will respond promptly. Be aware, however, that your question and the subsequent answer will be automatically forwarded to all other tenderers anonymously. Be careful therefore and don't give confidential information away in any questions asked!

6. Pricing

- Be careful when setting the **price** - make sure that you achieve full cost recovery but also show value for money. If possible, do some research into what others may charge. Make sure you allow for all the costs - don't ignore costs such as stationery, travel expenditure etc.
- The business may wish to consider applying a contingency allowance to the price to allow for cost variations. This may apply where the cost of a component raw material may potentially vary significantly during the contract duration. If this is required, make the Buyer aware that this contingency is being added and explain why.
- If specifying a price over a number of years, make sure that you increase the price slightly year-on-year to allow for inflation changes.
- For time-based contracts, suppliers are usually asked to provide a proposed charge rate for the individuals involved in the project, presented on an hourly or daily basis. Suppliers may wish to quote a rate for each individual or to categorise the team by role and/or seniority and provide a rate for each category.
- When estimating the time to be spent on a particular project task, include:
 - time incurred on professional work as defined in the contract
 - meetings
 - time spent travelling in connection to the project.
- When asked to estimate expenses which may be incurred by the project, these should be grouped, and will commonly include:
 - Travel and transportation.
 - Equipment, materials and supplies which specifically need to be purchased to be used on the project.
 - External support services, such as translation, legal costs which need to be brought in from the outside.
 - Printing and production of contract-related outputs.
 - Subsistence allowances.

7. Prepare a well formatted document you can be proud of

- Make sure you read the documentation very carefully and answer questions fully in the format stated.
 - Although the general structure of your proposal may be dictated by the Purchaser, make sure you include the following:
 - An overall summary of your proposal (in the cover letter or at the beginning of the proposal document).
 - Your understanding of the requirement and organisational objectives.
 - How you are going to carry out the work - step by step.
 - A timetable for delivery of the service and how you intend to manage the project.
 - Information regarding your skills and experience of similar work.
 - Your pricing structure, being as transparent as possible.
 - An explanation of the benefits and value for money of your bid.
 - An overall summary of why the Purchaser should award you the contract.
- Make sure you prepare a professionally presented proposal. Even though this is not part of the evaluation, how a document is presented cannot fail to create an impression of your organisation.
- Some specific tips:
- Include a cover letter that responds to the bid invitation, summarises your main message and explains how the documents are organised.
 - Keep sentences and paragraphs short and concise.
 - Use bullet points and headings to break up text.
 - Make sure that everything is standardised, for example CVs and testimonials.
 - Use appendices for supporting additional information.
 - Include a front cover page with the tender title and reference, date and your company name.
 - Include a contents page.

8. Check, check and check again...

- Always get someone else to proofread your proposal. This will not only help check the spelling etc but also make sure that it makes sense to someone who doesn't necessarily know your organisation. Be particularly careful with technical proposals - don't forget, not all of the evaluation team will be as technically experienced as you so make sure your solution is presented clearly.
- Be careful to follow the submission guidelines and check that you have completed everything that is asked for within the tender instructions.
- Make sure that all required documents are signed.
- If you are not submitting the proposal electronically, make sure you provide the correct number of copies in the way stated.
 - Be aware that information from your tender may be disclosed in future by the Freedom of Information Act. You should state clearly any information which is commercially confidential, and if particularly sensitive you might want to ask for a non-disclosure agreement.
 - Keep a hard copy of your electronic submission.

9. Make sure you submit your proposal on time

- When a deadline is set for the submission of a tender, it must be delivered by the stated time. No organisation will consider your tender if it arrives after the closing date/time even if you only miss the deadline by minutes.
- The Central Procurement Directorate allows suppliers to 'upload' their proposals via the www.cpdni.gov.uk website. When submitting documentation electronically, make sure you allow enough time for 'technical hitches'.
- If submitting by hand, it is advisable to either deliver the proposal yourself or by recorded delivery, to ensure it arrives safely. Make sure you allow for traffic problems and always ask for a delivery receipt.
- If you miss the deadline by any chance, make sure the purchaser is aware that you were interested in submitting, just in case there is a problem during the evaluation and the tender is re-issued.

10. Giving a presentation

If you are shortlisted, you may be asked to deliver a presentation to the client. This is your opportunity to shine!

- Prepare well and leave plenty of time to practise.
- Allocate overall responsibility for the presentation to a single person, whose responsibility is to plan and prepare the presentation. However, try to avoid using a single person to present the entire presentation, instead allocate the topic areas to specific people who will be involved in the delivery of the areas within the contract.
- Make sure the presentation slides are concise with each slide containing a number of carefully chosen bullet points. Try to keep to no more than six bullet points per slide. Add some graphics to each slide to make it more interesting.
- Consider taking professional advice on this important area if needed.

11. Make sure you get feedback

- If you are successful in your bid, then well done!
- You will receive a letter from the supplier stating that you have been successful, however, there will then be a 10-day 'standstill period' allowing the other tenderers to receive feedback. If there are no objections then the contract will be awarded.
- If you are not successful don't lose heart... a good target success rate for any organisation is one in three, so you will not be successful every time. After receiving your letter make sure you contact the purchasing contact and ask them for feedback as to why you were unsuccessful. You can learn a lot from this exercise and it will help you position yourself against your competitors and improve for the next time.
- The type of information public sector organisations are required to provide you with includes:
 - How many were in the competition.
 - Your overall ranking.
 - Where your bid failed in each of the criteria.
 - How your costs ranked overall.
 - Highlight potential areas for future improvements.

If you are in any way unsure about the evaluation process and feel that there was something which made the process unfair, and you would like to challenge it - don't be afraid to do so, it is not uncommon for tenders to be re-issued due to an anomaly of some sort.