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A Guide to Successful
Tendering

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1.0 INTRODUCTION

This guide is designed to provide practical advice on tracking, planning, writing and submitting tender bids. The document covers the initial ground work involved in the tendering process. It then moves on to selecting, planning and writing the tender document and finally deals with evaluating the tender process and requesting a debrief from the client. The document is designed to provide you with a checklist of the essential tasks which are key to successful tendering.



The trick to successful tendering is to be selective. Always ask yourself if the tender makes good business sense. The answer is quite often no.



2.0 TENDERING – THE GROUNDWORK

There are six main steps that are important in the initial stages of the tendering process. These are discussed in detail in this section.

2.1 Identifying Tender Opportunities

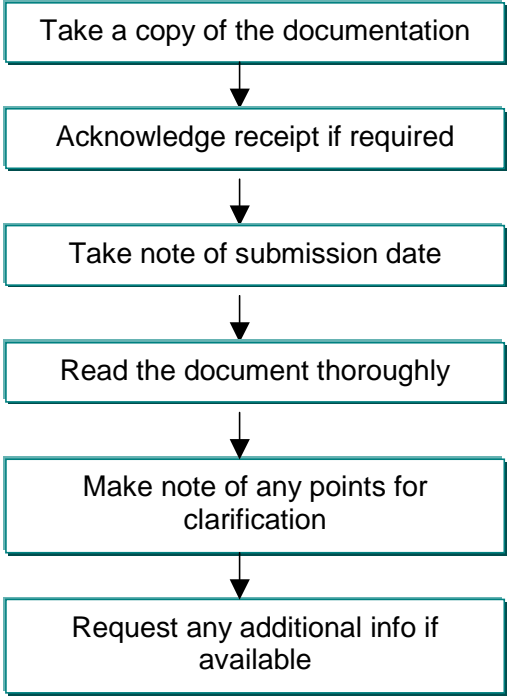
- ❖ Tracking and identifying tender opportunities is the first step in the tendering process. It is advisable to dedicate resource to this as tendering should be seen as an ongoing process.
- ❖ Initially, identify the most relevant sources:

Tender Sources	
Councils	Official Journal of the European Community (OJEC)
Tenders Ireland	Newspapers
Company Sites	Web based tender directories

- ❖ Always clarify, when requesting documentation regarding a tender if it is pre-qualification documentation or full tender documentation.
- ❖ Do not dismiss a potential tender opportunity if you feel the project is of interest to you but you don't have enough staff to resource it. Always consider partnerships/joint ventures.



2.2 Upon Receipt of the Invitation to Tender



2.3 Seeking Clarification

In a lot of cases the tender document can be vague and you will need to seek clarification from the client on certain aspects of it. The questions you ask will be made available to all other parties interested in submitting a proposal. The following is a list of questions that have been asked about tender documents in the past:

- ❖ Is there a budget ceiling on the project?
- ❖ On what criteria will the decision be made?
- ❖ Who will make the decision?
- ❖ How many copies of the response are required?
- ❖ How many invitations to tender were sent out and to whom?
- ❖ Is there an internal bid?
- ❖ What level of detail is required?

These are general questions but you will have more detailed questions specific to each individual terms of reference.

2.4 Respond or Decline?

Before making the decision to submit a tender there are a number of key considerations that will help you make the right decision:

- ❖ Check the timescales for the submission of the proposal - is it realistic?
- ❖ Are you able to meet the project requirements inside the proposed budget and what is the potential profit margin?
- ❖ Do you have sufficient experience in the particular area of expertise required?
- ❖ Can you deliver the project in the timescales provided?
- ❖ Having read the terms and conditions, can you meet them?



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- ❖ Do you already do business with this organisation? Any ethical or business reasons not to proceed?
 - ❖ Are you able to meet the requirements of the project?
 - ❖ Do you have an existing relationship with the company/organisation?
 - ❖ Check if the tender is a call off tender – this means that if your proposal is successful you are on an approved supplier list but are not always guaranteed work. The contract might also be for an extended period of time with a fixed rate which is non-negotiable. Is this something you would benefit from?

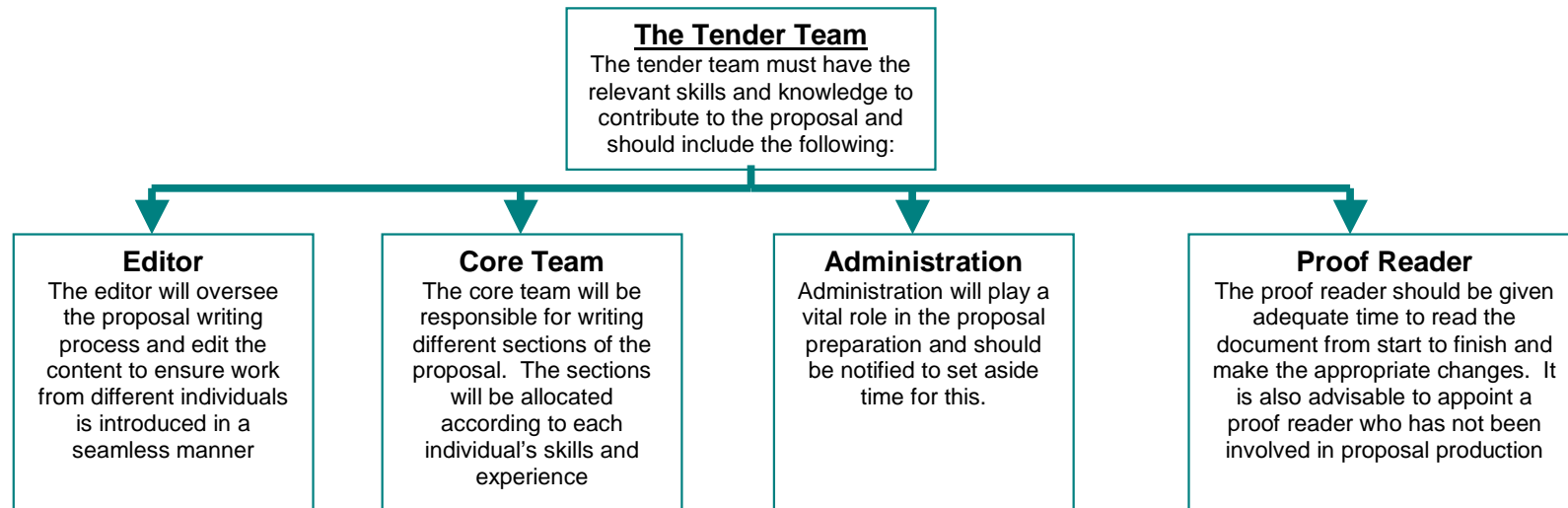
You should take all the above points into consideration before deciding whether to submit a proposal.



2.5 Your Tender Team

The size of the tender team will be dictated by the size and value of the proposal to be written.

For substantial tenders consider the following team functions:



With clearly defined roles, such as described above, the proposal document will be comprehensive, accurate and completed on time.



2.6 Proposal Planning

Planning is essential when composing a tender bid and time taken at the planning stage will ensure a smoother all round process. Write a detailed action plan with timings against each task. The following is an example of the elements that the action plan should incorporate:

- ❖ Roles and responsibilities of the tender team should be stated clearly at the beginning – giving a detailed account of what is expected of each individual.
- ❖ Proposal approach should also be stated clearly so that the team is clear about what the proposal will include.
- ❖ Draw up a detailed schedule of work that sets out when each individual's contribution is to be completed.

This should be circulated to all members of the tender team.



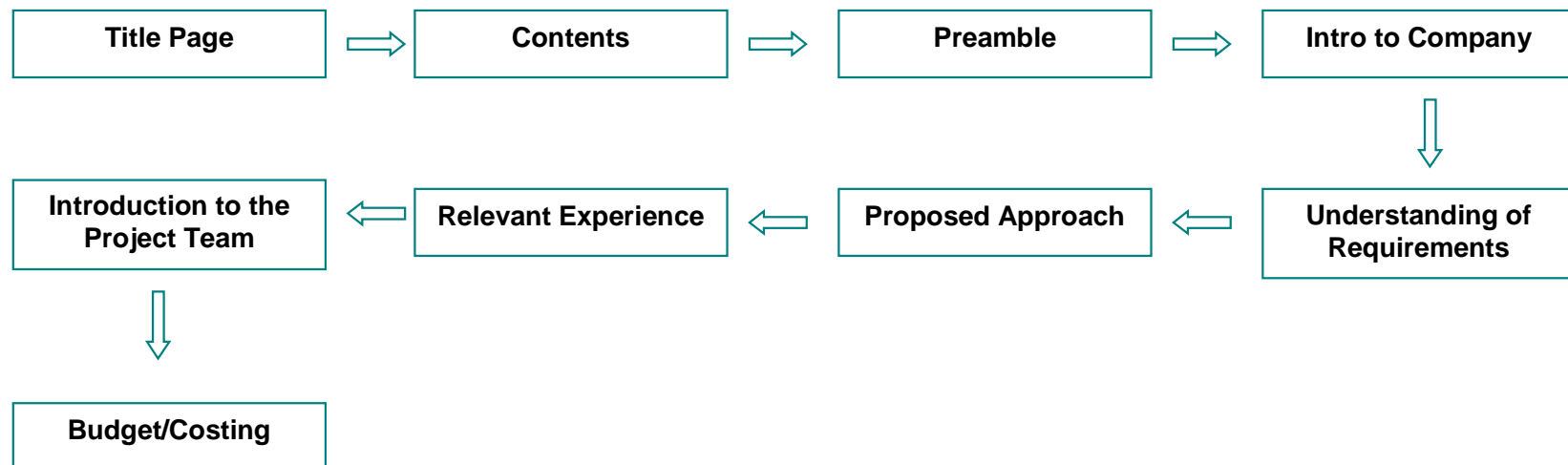
3.0 WRITING THE PROPOSAL DOCUMENT

There are three main steps which are important when writing a tender. These are discussed in detail in this section.

3.1 Proposal Structure

In order that your proposal covers all the required areas it is a good idea to structure the document in the same way as the tender document is structured. This way it is clear to the client that you have all the necessary skills and experience without them having to search the document to find it.

Below is a standard structure which you can adapt according to the constraints of the individual terms of reference:



When writing the proposal document make sure that the information is laid out in a clear, concise fashion so that the reader is clear that your company has the skills necessary to deliver the project. Always write in plain English and cross-reference rather than repeating information.

3.2 Writing the Proposal

It is essential to appoint one person to lead the development of significant proposals. This person will coordinate all aspects of the development process. The appointed person will act as the editor of the document, ensuring that all individual contributions are submitted on time and are formatted in a similar fashion so that the final document is not disjointed.

The editor's role is to ensure that there are enough resources available to complete the proposal on time. The appointed person might also be involved in proof reading duties towards the end of the proposal development process.

When finalising the tender document you should ensure to:

- ❖ Gather all individual contributions and bring together in one document.
- ❖ Carry out detailed formatting in order that the work does not look disjointed. This is a time consuming task so allocate adequate time for this.
- ❖ Proof read the document making any necessary amendments and then proof read again to ensure accuracy.
- ❖ The editor should then have a final read through the document to ensure that all the different sections flow.

Try to be as realistic as possible when planning proposal development. It is a good idea to set a deadline for work submissions at least one full working day before the tender is due. This way there is time for proof reading, amendments and gathering supplementary documents. It is essential that the proposal reaches the client on time as it will not be accepted if submitted after the deadline.



3.3 Costing the Project

If the terms of reference do not provide a budget for the project then it is advisable to ask if there is a budget ceiling. The client is not obliged to provide this but it is still worth asking the question. If you are not given a budget to work with it is a good idea to compare the project with similar projects you are already delivering in order to get an idea of the budget.

The costing for the project should always be presented in a clear and concise manner showing the total amount followed by a relevant breakdown of the cost per day/product. It is important to show VAT where relevant as this is not always automatically added on.

When completing the budget, always ensure you have taken all costs into consideration, for eg expenses, professional fees and administration time.

3.4 Submission

When finalising the proposal it is crucial that you follow the instructions in the terms of reference which detail the practical requirements concerned with proposal submission – such as the number of copies required, whether the proposal should be in colour or if it is to be submitted by hand or electronically. Regardless of whether the proposal is submitted by hand or electronically it is advisable to leave enough time to gather any supplementary documentation such as CVs and other such appendices. It is common to underestimate the time it takes to collate these.

3.5 Do you Need to Present your Submission to the Client?

In some cases your proposal will be successful in the first round of the selection process and you will be invited to present your proposal to the client. There are three main steps that are important when presenting to the client. These are detailed below:

Preparation

The presentation needs to be planned as meticulously as the proposal itself as this stage is a crucial element of the selection process.



Before commencing preparation for the presentation it is a good idea to talk to the client in order to get a clear understanding of the purpose of the presentation and the level of detail required. The level of detail required can be deduced from the length of time the client wants you to speak. Also find out how formal the client would like your presentation to be as it may be as simple as talking them through your bid rather than a stand up, formal presentation.

Practical issues like room layout and available presentation equipment are also important to ascertain before the day of the presentation. Once you have a clear understanding of what is expected of your company during the presentation, it is time to select a presentation team.

The Presentation Team

The size of the presentation team might also be something worth asking the client. They may want a limited number of people involved which you need to adhere to. Regardless of the number of people in the presentation team, it is essential that each member has a thorough knowledge of both the proposal and your product/service offering. It is ideal if the person who was most involved in the development of the proposal is the person who delivers the presentation, however this is not essential. Each member of the team must be competent enough to answer difficult questions about both the proposal document and your product/service offering.

Once the team has been finalised and briefed you must begin planning your approach to the presentation. The actual content of the presentation will be largely dictated by the brief provided by the client. Remember the client will have your proposal in front of them and therefore may not require you to regurgitate it during the presentation. You may be asked to provide some practical examples of your experience.

Rehearse the presentation thoroughly and think of some tricky questions you may be asked and prepare some solid answers.

On the Day

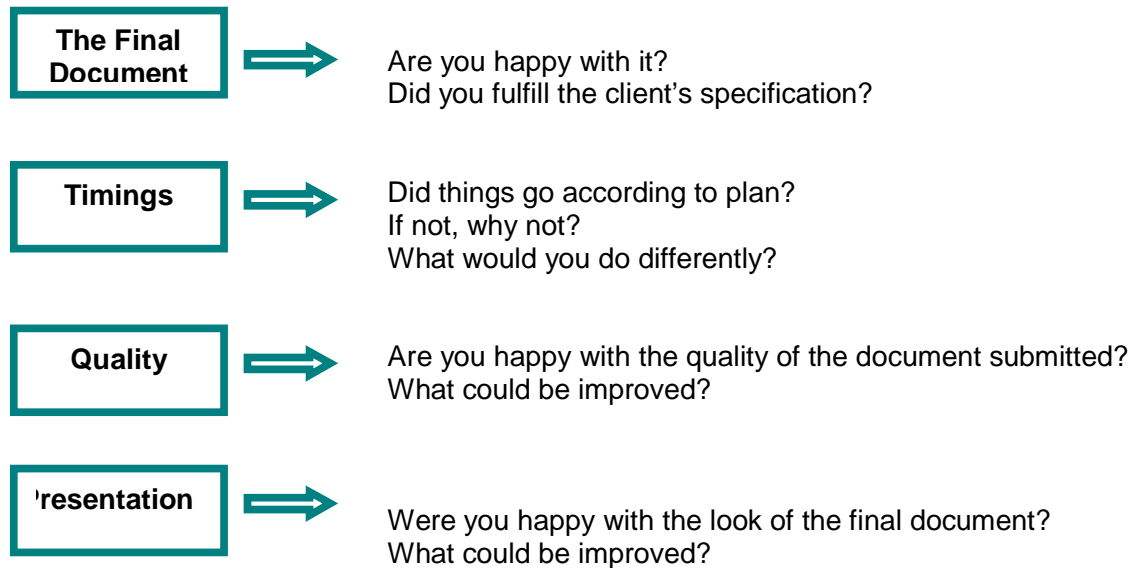
Check that you know how to get to the venue well before the day of the presentation and ensure to arrive at least fifteen minutes in advance so that you can deal with any equipment errors which may occur.

When you finish the presentation, make sure to ask when the decision is expected to be made. Confirm your company contact assure the client they will be available if there are any additional questions.



4.0 POST SUBMISSION TASKS

Immediately after you have submitted the tender it is essential that you carry out an internal evaluation of the proposal development process. This is important whether you win the job or not. In this evaluation you should consider the following:



The results of this evaluation should be circulated around the tender team for future reference.

Once the contract has been awarded, the client is obliged to provide you with a debrief about your submission whether you were successful or not. It is important to request this, even if you win the job. If you are unsuccessful you are entitled to know who the successful organisation was. You are permitted to ask the client anything about your proposal. However the client is not always obliged to answer everything you ask. Some sample questions are detailed below:



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- ❖ Which areas of the proposal were deemed to be lacking?
 - ❖ Was the costing too much/ too little?
 - ❖ Was there anything the client felt was innovative in the proposal?
 - ❖ What was the evaluation criterion?
 - ❖ How did you score on each?
 - ❖ Were the CVs for each team member detailed enough?
 - ❖ How did your price compare with the other submissions?
 - ❖ What did the successful organisation do that you didn't?
 - ❖ Did you complete the compulsory Forms of Tender documents accurately?

These are just some standard questions you could ask but you will have more questions which are specific to each submission.



