

# 'How to write amazing tenders' Workshop

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# This Session Covers:

- Overview of the Tender Procedure
- Pre-qualification
- Managing the Bid Process
- Ingredients of a Successful Proposal
- Presenting Your Bid
- Skills Needed
- Practical Tips and Techniques

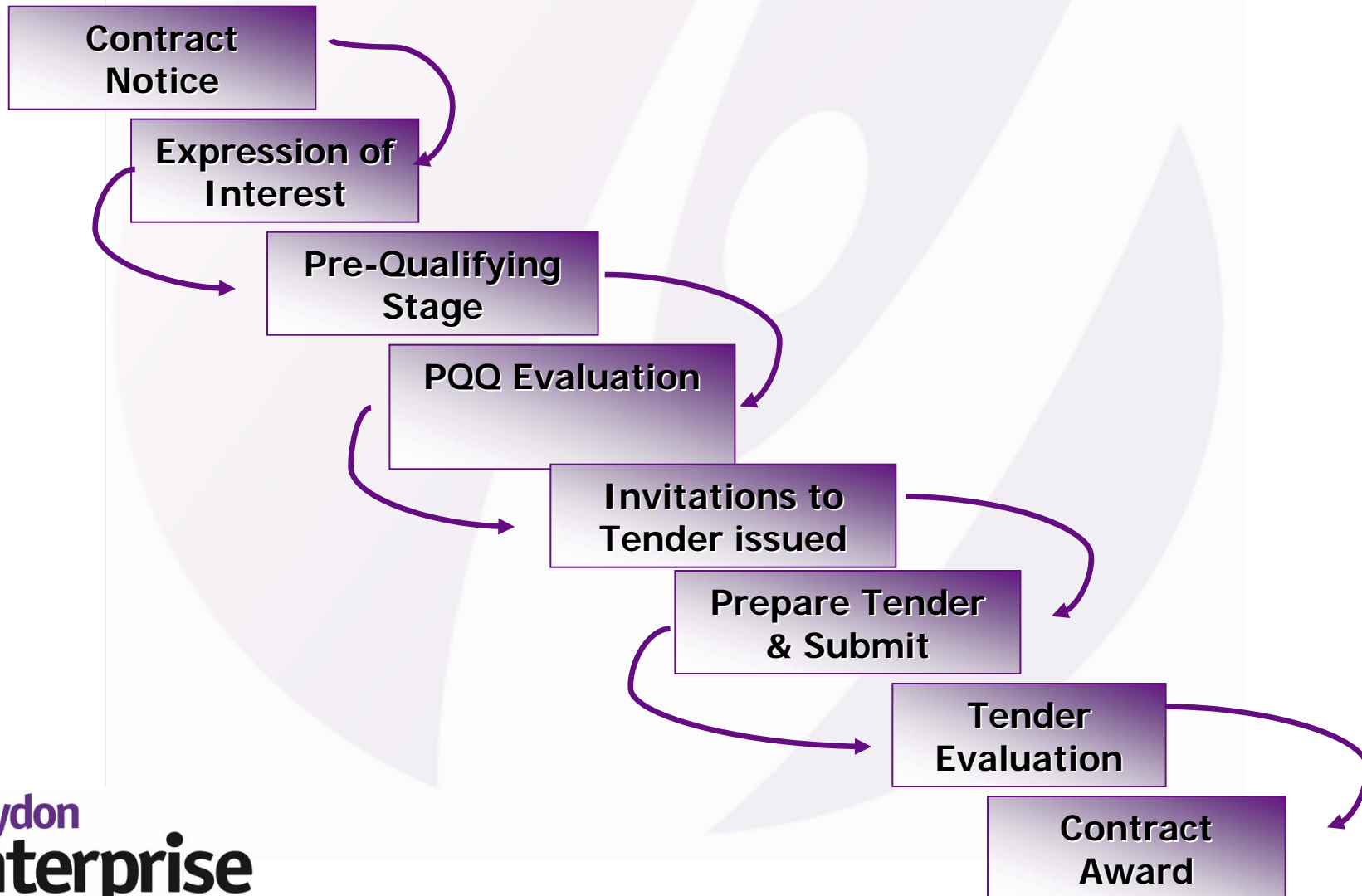
# Tendering for Contracts...



# Tender Process Overview

- Common Tender Procedures:
  - **Open** - Everyone who responds submits a full priced tender
  - **Restricted** - The contracting authority use a “pre-qualification” process and invites a limited number of respondents to tender

# Tender Process



# Tender Process

- Pre-Qualification Stage
  - Compliance
  - Are you a Safe & Appropriate choice?
  - Past Performance
- Tender Stage
  - Your service / product offering
  - Future Performance

# Understanding Pre-qualification

- Evaluation - 3 key areas:
  - Business Probity
  - Financial Standing
  - Technical Ability
- Mix of pass / fail and qualitative criteria.
  - Often a “fail” in some areas will disqualify you from proceeding further.
  - Uses a ‘relative’ marking system.

# Understanding Pre-qualification

- **BE COMPLIANT**
- Read the Instructions!
- Take Note of:
  - Submission Date
  - Other Deadlines
  - Clarification Process
  - Submission Format

# Pre-qualification Evaluation

- Common Pass / Fail Criteria
  - Accounts
  - Business & professional standing
  - Insurances
  - Staffing Levels

# Understanding Pre-qualification

- Company Information
  - Administrative Information
  - Business Probity
  - Professional Conduct
- There are wrong & right answers to these questions!
  - **Why do you need to demonstrate business probity?**
- Documentation Required:
  - Make sure you have access to:
    - Company History
    - HR Information
    - Administrative Information
    - Accreditation Schemes

# Understanding Pre-qualification

- Financial Information
  - Why do you need to demonstrate appropriate financial standing?
  - What are the Challenges & Barriers for SMEs?
- Documentation Required:
  - Make sure you have electronic copies of:
    - Accounts
    - Certificate of incorporation
    - Certificate of Name Change
    - Insurance Certificates

# Understanding Pre-qualification

- Technical Capability & References
  - Contract Performance
  - Staff Competencies
  - Subcontractors
  - References
- **Parts of these sections need to be specially written for this opportunity, as opposed to providing generic information.**
- Ask yourself: Why is my company the most appropriate and safe choice for this contract?
- Be very clear about your advantages and unique selling points

# Why Choose You?

- Common Misconceptions about SMEs:
  - Not Value for Money
  - Perceived as “unreliable” or “unprofessional”
  - Lack of quality or credibility
  - “Too small to provide scale of service needed”
  - Lack of awareness of examples of success delivery

# Selling Yourself in a PQQ

- Exercise:
  - What are the selling points of local and small Businesses?
  - List three possible benefits to a potential client.

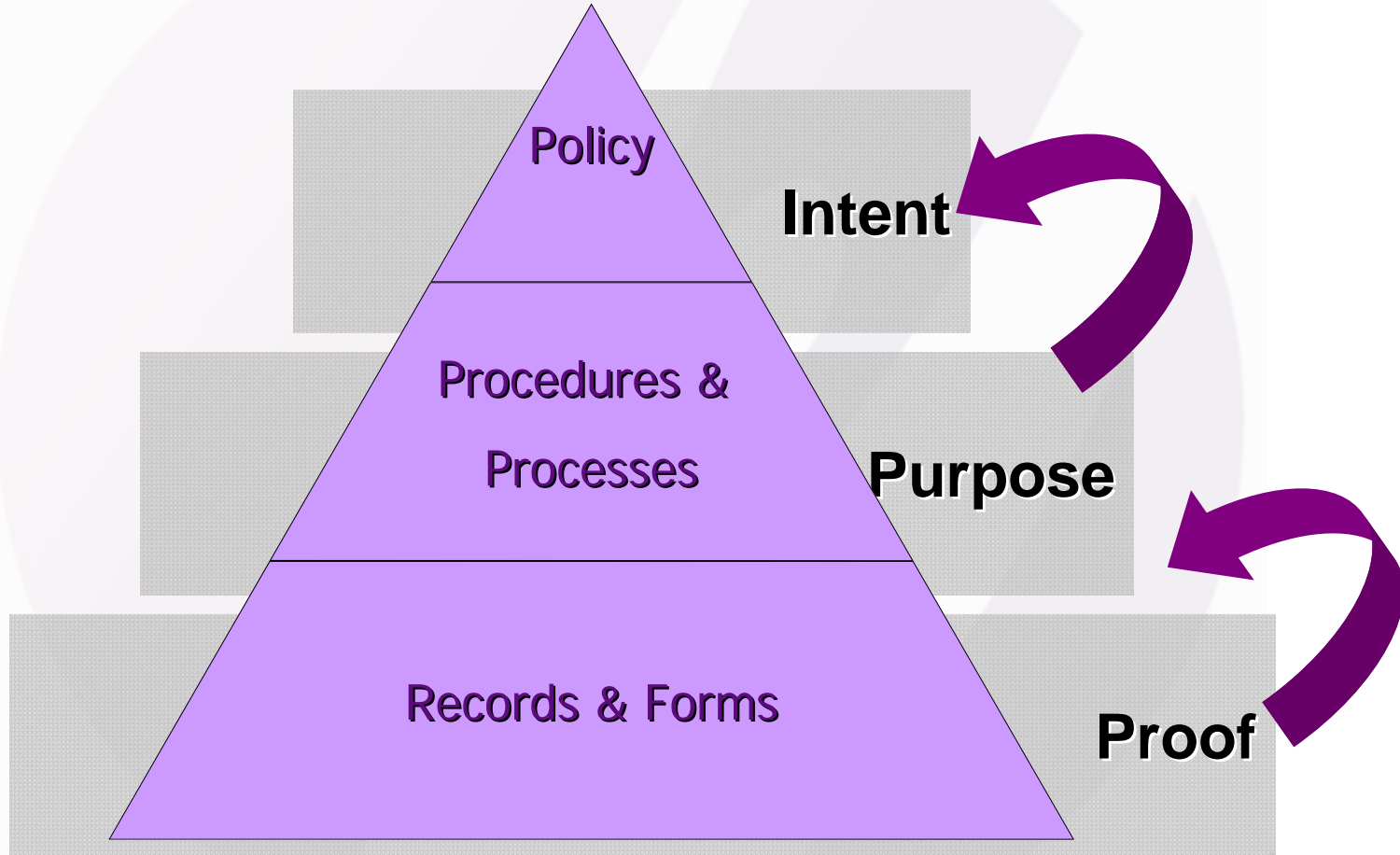
# Why Choose You?

- Possible Advantages:
  - Specialists in your area.
  - Innovative solutions based on clearer understanding of needs.
  - Improved quality through better customer care.
  - Service User / Needs led approach to service delivery.
  - Access to hard to reach groups / Community Links.
  - Social Impact Track Record.

# Understanding Pre-qualification

- Essential Policies
  - Equality & Diversity
  - Health & Safety
  - Environment & Sustainability
  - Customer Care (Quality)
- Policy Benefits - Exercise:
  - What are the business benefits of adopting policies in these areas?

# Developing Policies



# The Invitation to Tender

- A Pack of Documents:
  - A letter of invitation to tender
  - Instructions to Tenderers
  - Standard Conditions of Contract
  - Specification
  - Pricing Schedule
  - Form of Tender
  - Any other relevant document
    - Tender envelope, label

# Steps to delivering a bid

1. Read the brief until you understand it.
2. Determine your USPs/ competitive advantage.
3. Decide whether to bid.
4. Appoint a bid manager.
5. Start to scope out the timetable.
6. Identify who needs to be involved.
7. Identify the key dates and milestones.
8. Set up the necessary meetings and signings.
9. Assign responsibilities and roles.
10. Detailed project programme

# Deciding Whether To Bid

- Do we have the skills to deliver this project (or can we get them)?
- Do we have the capacity/resource to deliver it at the right time?
- Can we price it a level that is attractive?
- Can we demonstrate that we are the best choice?
- Can we respond in time?
- **Can we win it?**

# **Discussion: What are the Ingredients of a successful proposal?**

# Bid Writing: The Basic Ingredients

- What we will do
- How we will do it
- Who will do it
- Where we will do it
- When we will do it
- How much it will cost



# Bid Writing: The Icing on the Cake

- Demonstrates a clear understanding of the brief
- Play it back, paraphrase, comment upon it to show you have understood.
- Extrapolate outcomes, Adds value and brings innovation to the brief
- Provides evidence of relevant previous success in this area
- Explains “why choose us?”
- Creates a strong brand identity



# Competitive Positioning

- Why choose your approach?
- Why choose you to deliver it?
- How to test your unique selling points:
  - So What.....
  - Yeah right.....



# The Importance of Value

- Value for Money (VfM)

*“The optimum combination of whole-life cost and quality (or fitness for purpose) to meet user’s requirements. This is rarely synonymous with price”*

# Bid Writing: Skills Needed

- Ability to write long documents in plain English.
- Understanding of what is required and how your organisation will deliver it .
- Able to articulate the value proposition of your proposal.
- Full knowledge of using Word and its helpful features.
  - Use of templates / Styles
  - Amending Page set up
  - Page & Section Breaks
  - Headers, footers, page numbering
  - Tables
  - Cutting & Pasting
  - Automatic contents page

# Plain English

- General rules:
  - Short sentences (15-20 words max)
  - Active not passive verbs
  - Say “we” and “you”
  - Avoid jargon and unexplained abbreviations
- The most helpful resources:
  - [www.plainenglish.co.uk/howto.pdf](http://www.plainenglish.co.uk/howto.pdf)
  - [www.plainenglish.co.uk/reportsguide.pdf](http://www.plainenglish.co.uk/reportsguide.pdf)

# Before and After Exercise

Your enquiry about the use of the entrance area at the library for the purpose of displaying posters and leaflets about Welfare and Supplementary Benefit rights, gives rise to the question of the provenance and authoritativeness of the material to be displayed. Posters and leaflets issued by the Central Office of Information, the Department of Health and Social Security and other authoritative bodies are usually displayed in libraries, but items of a disputatious or polemic kind, whilst not necessarily excluded, are considered individually.

# How Tenders Are Evaluated

- Published evaluation criteria:
  - Best Price
  - Most Economically Advantageous Tender (MEAT)
    - Usually evaluated by a panel
    - Scoring matrix used to objectify subjective opinions
    - Scores are weighted
    - Tendering rigorously controlled and audited
    - Company with highest mark will win the commission

# Sample Tender Evaluation

## Organisation X

### Estates Services & Central Stores Tender

#### Tender Evaluation

Score each element:

- |          |                                                             |
|----------|-------------------------------------------------------------|
| <b>0</b> | <b>No information submitted</b>                             |
| <b>1</b> | <b>Does not meet the requirement in any respect</b>         |
| <b>2</b> | <b>Partly meets the requirement</b>                         |
| <b>3</b> | <b>Meets the requirements of the tender specification</b>   |
| <b>4</b> | <b>Exceeds the requirements of the tender specification</b> |

Each score will be weighted and a multiplying factor applied.

# Tender Evaluation

- Non-financial considerations:
  - Track record on performance
  - Staffing capabilities
  - Transaction costs
  - Quality
  - Innovation
  - Monitoring/managements arrangement
  - Community benefit
  - Ability to develop good working relationships
  - Realism of offer
  - 'Cultural fit'

# How organisations with a good service let themselves down

- Not achieving the right balance between thinking and writing
- Not being able to write about what they do
- Writing by committee/no narrative flow
- Talking about what you want to sell, rather than what they want to buy
- Failure to understand the specification
- Using an answer for more than one question (e.g. "see question 2")
- Answering specific questions with generic blurbs

# Tender Presentations

- Often follows a prescribed format:
- Little opportunity to engage
- No positive feedback
  
- Structure
  - State what you going to tell them
  - Tell them
  - Summarise what you have just said
- Clarity
  - Limit the number of messages you are trying to convey
  - Keep information relevant (to the opportunity you are pursuing)
  - Avoid jargon and unexplained technical terms
- Stimulating
  - Make the presentation interesting
  - Use visual aids to reinforce your message

# Contract Award

- A formal contract will be issued
- Opportunity to Appeal
- The contract protects both parties
- Your tender will form a significant portion of the contract

# Asking for Feedback

- Explain why you need the feedback
- Ask at the right time
- Give them a chance to prepare a helpful answer
- Be specific in what you want to learn
- Don't forget to ask in successful bids too!

# Help is available.....

- [Croydon Enterprise](#) - a complete package of support for local people who want to start or grow their own business, develop their skills or find a new career.
- [Business Link London](#) - main portal for businesses seeking support
- [Supply London](#) provides support to London's SMEs with a specific focus on public sector procurement.
- [South London Business](#) provides information, advice and guidance to companies in the twelve London Boroughs south of the River Thames
- [Greater London Enterprise](#) provides a wide range of business support to those looking to grow their business.

- For a copy of this presentation email [angela@btob.co.uk](mailto:angela@btob.co.uk)



**ACT NOW!**