

# Tendering Top Tips and Readiness Checklist

## Table of Contents

---

<b>1</b>	<b>Before you get started</b>	<b>3</b>
<b>2</b>	<b>Writing your bid</b>	<b>3</b>
<b>3</b>	<b>Moving forward</b>	<b>4</b>
<b>4</b>	<b>Tender Readiness Checklist</b>	<b>5</b>

---

# 1 Before you get started

---

- If you are new to tendering, it is advisable to target lower value opportunities to begin with as they will generally have less stringent qualification requirements than high value contracts.
- Consider forming a consortium or applying to be part of a supply chain for a current contractor as a potential first step before committing to your own bid.
- Arrange training with a reputable provider on preparing bids and selling to the public sector – advice from more experienced tenderers can give you a significant head start.
- Actively market your products and services to the public sector just as you would to private firms - pre-engaging with buyers in advance of the tender documents being released can provide you with valuable insights into their specific needs.
- Network - attend industry and sector specific events and talk to public sector buyers about their requirements and upcoming tender opportunities.
- Only bid for work you are sure you can do – poor performance on contracts can be grounds for exclusion from future tenders.
- Ensure that your business is compliant. For high value contracts public sector bodies will often require proof that your business has sound finances, experience in providing the services you're offering, and demonstrable compliance with regulations.

# 2 Writing your bid

---

- Be clear, concise and make sure you accurately and comprehensively answer all the questions.
- If you are unsure of anything contained within the bid documents use the clarification process to submit queries.
- Highlight how your skills, experience or what you propose will meet the buyer's needs and try to emphasise what other benefits – such a social value – you can bring to the contract.

- 🕒 Try to provide hard evidence to support any claims you make, such as case studies, testimonials from happy clients, award wins, or good survey results.
- 🕒 Ensure that your finished bid is properly proofread and edited before it is submitted.

### 3 Moving forward

---

- 🕒 Build up relationships with public sector buyers where and when possible – conduct it as you would any sales process and have a CRM system in place.
- 🕒 Monitor news, events, and publications in your business sector in order to keep up to date with trends and developments in your industry.
- 🕒 Follow up on press and other reports – larger suppliers who have won a contract can provide opportunities for sub-contracting.
- 🕒 Research contracts outside your business sector which may produce secondary contracts for you, e.g. if a new office block is built, it will need carpets, desks, signage, stationery and cleaning etc.
- 🕒 Maintain a reference library of past tenders and information – this will help you complete future responses more efficiently.

## 4 Tender Readiness Checklist

Capability – Your Company	Tick
<p><b>Company Info</b></p> <p>Standard company information is usually requested such as contact information, company registration and VAT numbers, parent company info and details of the board members/senior management.</p>	
<p><b>Products / Services</b></p> <p>Before bidding, each company should have a clear idea of the products and services it intends to sell to the public sector. It would therefore be beneficial to have a fact sheet for each product or service that outlines its exact capabilities, technical information if applicable and its unique selling points to ensure consistency in your written responses.</p>	
<p><b>People</b></p> <p>You may be asked for CV or information on the people who will be working on the contract and with the new regulations, this will now become an area you can be asked and scored on. To create a professional image you should collate all CVs into a standard template and store them to use on future tenders.</p>	
<p><b>Experience</b></p> <p>Demonstrating transferable experience is the key to success in public sector tendering so keep a log of all contracts you have worked on, the value, outcome and contact details for that all important referee you can put down in your next tender. You might also want to consider asking your contact to pre approve being a referee so you don't have to spend time chasing them down to agree to be a referee during a time critical tender.</p>	
<p><b>USPs / Innovation</b></p> <p>You need to be able to clearly explain what your innovative and unique selling points are in your tender as these are the things that will set you apart from your competitors. It is important to be able to quantify your innovation/USP. For example 'We are the number one supplier of...' has no factual weight but 'We are the number one supplier of... over 80% of local authorities currently use our products' does.</p>	
<p><b>Partnership</b></p> <p>If you work in partnership or subcontract work you will need to be able to define these arrangements and provide assurance that you are able to provide</p>	

consistent quality across all business activities. It is a good idea to have a standard Service Level Agreement in place with your supply chain that ensures they are meeting the same standards as yourselves in terms of quality, health and safety, environmental sustainability etc.

Capability – Outside World Understanding	Tick
<p><b>Contracting Authority Knowledge</b></p> <p>If you are tendering for a public sector contract it is important to understand that this particular tender will be part of a wider procurement strategy and you need to know what this is to be able to understand the requirements, needs and issues of the contracting authority.</p>	
<p><b>Competitor Knowledge</b></p> <p>It is important to know who else is likely to be tendering for the contracts you are and for you to have as much information as possible about them. Conducting a simple SWOT analysis on your competitors at regular intervals throughout the year will ensure you have the information ready for your next tender.</p>	
<p><b>Process Understanding</b></p> <p>Do you understand how the public sector procurement process works? Do you understand the particular process that is being followed for each tender you work on? Do you know your rights as a supplier and what rules the contracting authority must follow? The answers to these questions will have a huge impact on how the process is managed and may dictate your bid management plan.</p>	
<p><b>Pricing</b></p> <p>Heavily linked to your competitor analysis you need to have an idea of what the industry pricing standards are for your product/service. As the majority of tenders carry a high weighting for the costs getting the pricing wrong can mean that all the effort spent crafting responses to the technical questions is wasted as you were never likely to win with a price that was way outside what your competitors are offering.</p>	

Capability – Policies, Processes and Information	Tick
<p><b>Accounts</b></p> <p>Thanks to the new regulations there are a number of ways you can demonstrate your financial stability at PQQ stage. The Standard PQQ form on the Crown Commercial Service website will provide details of this.</p>	
<p><b>Insurance</b></p> <p>Depending on the tender you're applying for, you'll need certain levels of insurance with accompanying certification. Keeping these as part of your 'bid library' will save time during the tendering process and ensure the information provided is accurate.</p>	
<p><b>Quality</b></p> <p>You will require some form of quality management system with the ISO9001 standard indicating the standard you should strive to achieve either through accreditation or by having equivalent policies and processes in place.</p>	
<p><b>Health and Safety / Risk Assessments</b></p> <p>It is important to understand your legal obligations in regards to health and safety and have the policies, processes and documentation in place when tendering. If you are unsure of your obligations in this policy area or have limited skills in the workplace to manage your obligations, it is a good idea to get an outside agency in to manage health and safety in your company and to try to achieve the ISO18001 standard.</p>	
<p><b>Environmental Sustainability</b></p> <p>This is a key area in procurement where you can demonstrate 'added value' to your proposal. It is worth investing in developing an EMS system such as ISO14001 which will provide a framework for you to monitor and record your capabilities.</p>	
<p><b>Equality and Diversity</b></p> <p>All contracting authorities will want to be assured that you are meeting your legal requirements in this policy area. It is a good idea to keep copies of any job adverts or training you have conducted and to be able to provide examples where you have made reasonable adjustments to the workplace to support a vulnerable group.</p>	
<p><b>Disaster Recovery / Business Continuity</b></p> <p>Continuation of services is of the utmost importance to the public sector as is the safety and security of any information they provide you with. They will be looking for</p>	

<p>you to have robust contingency and safety measures in place to provide them with reassurance that you will be able to work in adverse circumstances.</p>	
<p><b>Corporate Social Responsibility</b></p> <p>CSR or life cycle costing for tenders is an expanding area of interest in the public sector – this can take many forms including the sourcing of products and the conduct of your supply chain. When tendering you are the sole responsibility for the contract and you will be expected to show that you are able to manage your suppliers and business activities in a fair and ethical way.</p>	
<p><b>Organisation Chart</b></p> <p>Keep organisation/ account management charts as simple as possible. If you have a number of different divisions and departments focus on the ones the buyer will be connected to and always remember to show names, job titles and accountability where possible.</p>	
<p><b>Certificates / Accreditations</b></p> <p>These are often your USPs when bidding so keep copies of your certificates and accreditations to hand – it might be worthwhile compiling a log of them with the relevant information such as the expiry dates and awarding body contact details.</p>	
<p><b>Method Statements / Process Diagrams</b></p> <p>Although you should aim to tailor the content of these for each tender to meet the specific requirements, it can be helpful to have a ‘starter for ten’ – so map out your method statements and processes for ‘off the shelf’ products and services and it will make writing the tender even easier.</p>	
<p><b>Case Studies</b></p> <p>These can be extremely powerful ways of responding to questions in a more down to earth way. Keeping a log of case studies to use when tendering will mean you don’t have to chase them down during the tendering window.</p>	
<p><b>Data and Reports</b></p> <p>Make it a priority to conduct research into your sector once a quarter or once a month so you can be sure you have relevant information to use in your tender. Similarly, you can use down time between bids to analyse your own data and statistics to produce winning USPs such as “99% of our customers would recommend our services”.</p>	