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Tendering Process - Part 1 How to improve your chances of tendering success

Tendering Process - Part 2

## Submitting your Tender

When you are invited to tender you move to a different phase, one where an understanding of the process will greatly assist your potential for success.
The initial tender announcement often seems to be overtly challenging and the information requested may seem difficult to satisfy. If you study a few notices you will see they are all remarkably similar and this is because their format is determined by EC legislation. The items you are requested to forward are almost always the same.
It is easy, therefore, to build a database of required information. BiP's SELECT service is a free Internet-based service which can provide you with the ability to store all the data likely to be requested of tenderers by a public sector authority.
Previous BiP Guidances focus on the tendering process and should be read in conjunction with this Guidance.
The manner in which you submit information is just as important as the content.
Remember that what you forward is a reflection on your company. Poorly presented, inaccurate or unintelligible information will give an unflattering representation of your company. Good presentation and information which is to the point and neatly laid out in a clearly defined order will win marks.
Remember, the first part of the selection process is Rejection.
If you are a client faced by dozens of expressions of interest or tenders, the first thing you wish to do is reduce the number. Do not give potential clients cause to reject yours just because of presentation. Only when the rejection process is completed is the selection process commenced.

## Ensuring Accuracy

There have been many occasions where all tenders received have been seriously flawed.
On reading a contract notice:
o Contact the named person and seek additional information. During conversation build a personal link and introduce your company services and mention other clients of yours who are in a similar line of business to this client. Show an interest in the client's needs.
o With your expression of interest, forward Satisfaction Certificates/letters of acclamation from other similar public bodies and list your current client base.
o If account information is requested, also forward a copy of credit rating information (Infocheck- D&B - CIC).
o Research incumbent strengths and weaknesses.
o If you are a small company without three years' financial accounts, you can still apply.
In your application state these accounts are not available.
o Make sure your presentation is professional. Include covering letter and brief promotional material.

o It is important that you have good Environment/Race/Equal Opportunity and Health policies, as these form an important part of most evaluations.
It is equally important that you express in your tender the environmental benefits your product has or how you take into consideration environmental issues in the production and delivery of your products.
Government have made a promise to SMEs to include them in their supply base. If you are an SME, say so, and point out the special benefits that can have - speed of change, core skills etc.

After the Award

Whether successful or not, seek a debrief.
If unsuccessful, remember virtually every contract is for a specific period, so keep in touch with the client during the contract; you will learn how it is progressing, what problems the client is experiencing and his priorities. That way, when retendering, you will have a much better understanding of how you should bid and the client will appreciate that your company is interested in his needs.
Make full use of information published within contract notices in order to identify:
a) Subcontractor opportunities.
b) Allied procurement opportunities.
c) Procurement personnel.
d) Public bodies and their locations.
e) Other product developments.
f) Competitors' successes.
Preparing the Perfect Tender
How you resource and prepare your tender response is a crucial factor in presenting a winning tender. Once your company is in receipt of the tender documentation it must put into effect a dedicated tender strategy.
On receipt of the document start a timescale diary. Log the receipt date and the due date for return of the document. Based on these dates and any other date stated for a pre-tender meeting, set out your timetable for the stages of your response and appoint a Tender Manager with the authority to conscript assistance from other expertise within your company.

Tender Manager's Initial Function

a) Decide whether to tender or not.
b) Duplicate the required number of copies.
c) Produce a tender timescale diary.
d) Safely store two copies for the tender response.
e) Read the tender document and send off for any relevant reference documents stated in the document.
f) Log the date of request for this documentation and ensure its speedy receipt.
g) Decide what team of experts is required to complete the tender.
h) Call an initial meeting of the tender team.
(This may include input from your design, production, finance, legal, commercial and sales personnel. It is important to include any sales personnel who have knowledge of the client; they are likely to appreciate from their past contact any requirements the client feels are important. These may not be obvious from, or even stated in, the

tender document, but when addressed in your tender are likely to be positively considered. This sets your bid above those of your competitors.)
i) Circulate reference documentation on receipt.

First Tender Team Meeting

The initial meeting agenda:
a) Read through the tender documents.
b) Reconsider decision to tender.*
c) Assign different aspects of the tender to appropriate personnel present.
d) Denote clearly on each copy who is responsible for each item.
e) Having referred to the tender timescale diary, fix a date for a second team meeting by which time all assigned work is to be completed.
* Should you decide to decline to tender, notify the issuing authority immediately. Give clear reasons for your decision and express a wish to be considered for future contracts.
If, as a result of your team's initial meeting, clarification is required, detail your questions for presentation at the pre-tender meeting or send the questions to the issuing authority for clarification; always send by fax and/or recorded delivery. Denote the date of your request in your tender timescale and if there is no response within a few days contact the client personnel.

Written Questions

The questions raised by any tenderer should be answered promptly by the client and these answers circulated to all tenderers at the same time. Normally the names of those asking the questions will not be divulged by the client; to be on the safe side, specifically request when asking questions that your company name is not divulged.
Pre-Tender Meeting Questions
If your questions are to be asked at a pre-tender meeting, allow others the opportunity to ask questions. They may ask questions sensitive to your bid strategy, which you may not wish to be seen asking. If other companies do not ask these questions, then wait until after the pre-tender meeting and ask the question in a follow-up letter as above.
If attending a pre-tender meeting ensure that your delegates understand the contract and are accompanied by employees (such as your sales representative) known to any issuing authority personnel who may be attending the meeting. Their presence gives the client a friendly face to which they can relate and lets it be seen that your personnel are personally interested in satisfying their customers' requirements.
Be prepared for questions to be asked by the contract holder or in-house provider which are specifically designed to affect the way you tender. The current contractor obviously knows the answers to these questions, but asks them so as to alarm its competitors and cause them to re-examine their interest and possibly increase their tender bid.
Such questions could, for example, be:
i) What problems has the client suffered in the past due to breakdown of their mainframe computer which is to be used by successful tenderer?
The answer may show a series of crashes which appear onerous. The truth, however, may be that, whilst these problems did occur, the fault had been rectified long ago and should not be an important element of your tender strategy or bid.

ii) Do demographic projections show a downturn in the likely quantities of items to be supplied, from those specified in the contract?
The answer may be yes and suggest that the number of items to be supplied in the contract will not be met, thus resulting in a higher unit cost being incurred by the contractor. The contract holder may know that past experience shows such surveys to have been consistently historically incorrect and that such a downturn is unlikely to occur. They will not be stimulated to increase the unit cost in their bid as a result. Yet the question will have the desired effect of increasing others' quoted per unit price.
Beware also of a sudden rush of questions being asked just prior to the tender return date; this may be another ploy by the contract holder to make you re-examine your tender proposal at the last minute, increasing the likelihood of mistakes being made in the tender presented.

Second Tender Team Meeting

Your tender team:
a) Presents and discusses the various elements of the tender they were allocated.
b) Considers the answers received from the client authority to questions raised.
c) Raises further questions.
d) Agrees the tender response.
Once the tender response has been agreed and all questions answered, the Tender Manager is charged with putting the various elements of the tender together.

Presentation

It is important to ensure your tender response is clearly and precisely displayed:
a) Avoid handwritten presentations; even the neatest writer tends to lose clarity after a time.
b) Use a type size one point larger than the issuing authority's document if possible. This displays your response clearly.
c) When submitting answers to questions asked in the documentation, follow the precise format of the original questionnaire and use the same headings and number sequence as used in the client documentation, for example: Heading Environmental Information:
Question 1.1 (answer) None
Question 1.2 (answer) Yes etc.
If you are required to respond to voluminous questions, ease the client's evaluator's work by displaying your answers page by page, matching exactly the questions and page configuration used by the client.
This allows the evaluators easily to compare the questions and answers. By creating an easily checked document, clearly typed, you raise your tender presentation above the majority.
Remember, the client officer (who is possibly responsible for checking a dozen or more voluminous presentations) is looking to reject tenders, so as speedily to arrive at a choice of just one, two or three tenders from which to make a final selection. Having read many pages of contractor information, often unclearly presented and badly laid out, your presentation will appear all the more impressive and give you an important edge.

Final Compilation

a) Remove from the safe storage the two unmarked tender document copies.
b) Complete and compile your tender response remembering your supportive information.
c) Check and recheck that you have completed the tender as specified by the client.
d) Check your enclosures and affix a covering letter denoting the order of your presentation and a brief description of each item.
e) If you are required to make your presentation within a set number of words or pages, ensure you have done so and denote the number of words or pages used.
f) If you consider further information on your company would be of assistance to the client, seek their written permission to include such information with your tender, but not included in the actual tender document.
g) Check you have signed each page as required and the correct signature is on your tender. If it says signed by the Managing Director, that is what is required.
h) Once fully satisfied that the tender presentation is complete, pass to a colleague for final checking.
Remember, more tenders are rejected because they don't conform to the requirements stipulated than because of price or quality of work.
Safely file your duplicate completed copy.

Despatch the Tender

a) Be careful to place your tender presentation in a package which does not denote your company and remember to use the label provided by the client. Check your mail franking machine does not contain the name of the company.
b) If delivering by courier, ensure your courier does not affix a label to the package which denotes any company.
c) Deliver the package in person if possible; ensure that it is delivered to the correct person at the authority and that you receive a timed signed receipt.
(Usually hand-delivered tenders are accepted and signed for on an incoming log; by viewing this log you can see which other companies have presented tenders.)
d) Log your delivery in your tender timescale diary.
e) Await the date of award if specified and contact the issuing authority if you do not receive a reply.
f) Keep monitoring until rewarded.
Remember most contracts are for set terms; even if unsuccessful, keep in touch with the client. A knowledge of how the contract is being executed by the new contractor and how the client considers their performance will be invaluable information when it comes time for renewal, and your company will be well known to the client and perceived as caring.

The Debrief

Whether your company is successful or not, it should seek a debrief, either received in writing or in person. Please remember, it is just as important for the winning company to know precisely why it won the contact as it is for the unselected company. It could be that the winning contractor only did so because of the default of others, or it may be that your bid was thousands below other bids, in which case your pricing strategy may be costing you profits.
Debriefing

Under the World Trade Organisation (WTO) rules, all public authorities to which it applies must offer unsuccessful tenderers a debriefing meeting.
The purpose of debriefing unsuccessful tenderers is intended not only to assist the contractor but also the issuing authority. It increases the potential for improved value bids on future contracts.
Contractors should see the opportunity of a debriefing as valuable information on the strengths and weaknesses of their bids. This opportunity to hear why other bids were considered more favourably than your own is considered by the Government as some recompense for the time and effort put into constructing your tender.
Suppliers must appreciate the importance of learning why their bid was rejected. Such knowledge can then be used to improve your next bid and result in your company being successful at a future date. It is no use bidding for many contracts unsuccessfully and never learning why.
So, even if you are not offered the opportunity of a debriefing, ask for one.
The topics discussed at a debriefing meeting can be wide-ranging. It is up to you to ensure that you receive full value from the debriefing programme. Therefore, have a list of questions you wish answered.
These should cover areas such as:
Cost; Equipment; Schedule; Sub-Contracting; Design; Industrial Relations; Delivery; Quality Management; Organisational Administration and Controls; Experience; Contract Terms; Personnel; After-Sales Service; etc.
Whilst local authorities are not required by European Legislation to give tenderers the opportunity of a post-tender debriefing, many will do so if specifically asked.
Even if they refuse your request, they are required to inform you in writing of the reasons for the failure of your bid and the criteria implemented in both selecting those companies invited to tender and also the attributes of the winning tender.
Far too often companies fail to request any form of post-tender briefing and, as a consequence, continue to respond to invitations to tender with basically flawed bids, which could easily, and in many cases without additional cost, have been corrected.

## Make Pre-Tender Meetings Work for You

Many contractors fail to make the best opportunity of pre-tender meetings. Indeed, some companies invited either refuse the invitation or accept but do not appear. Such a cavalier attitude does not best represent their interests.
The pre-tender meeting is probably the best opportunity your company will have to gain an insight into both your fellow tenderers' perspectives and the thoughts of the issuing authority.
Larger companies often consider the pre-tender meeting as an occasion at which they should be seen but not heard. They believe silence best protects their interests, so ensuring they do not divulge to others the direction of their own bid or ask questions, the answers to which may help competitors, and suggestions they may make may be incorporated into the others' bids. These are, of course, valid points, but total silence allows other companies the opportunity to express through their questions a professional approach which will be remembered by the issuing authority's personnel after the event. Such an impression can play an important part in the evaluation of bids at a later date.
Small, experienced, professional companies must avail themselves of every opportunity to promote their expertise. As they do not have the benefit of being associated with a renowned company, the pre-tender meeting is an occasion at which

they can express their technical ability to the full, in open competition with established and renowned companies. This serves to raise their company's profile and can leave the issuing authorities with a high opinion as to their capabilities. Failure to grasp this opportunity of marketing your company's strengths can be a fatal mistake. A small company has to overcome the issuing authority's knowledge gap.

## Presentation

Firstly, respond positively to the invitation. Always prepare and write down your questions in advance of the meeting for easy reference. Always be represented by at least two personnel, one to ask the questions, the other to take notes of the answers, questions and remarks of others. Ensure the personnel representing your company are technically competent both to ask and answer fully questions pertaining to the tender documents. Do not send senior management figures to impress the issuing authority personnel. This is a common mistake, which leads to their perception that your company may be technically incompetent.

If possible, tape the whole meeting and replay to other personnel involved in preparing your company's tender documentation.

Never rely on your memory to recall events.

If only one representative of your company is present, their attention is drawn to seeking opportunities to ask their questions and not to listening to the answers to others' questions. Even momentary distractions can result in you missing important information or intimations. Possibly this could relate to areas the issuing authority deems of paramount importance when considering submitted tenders.

By listening to the direction of questions from each of the other tenderers you can gain valuable information as to how they perceive the tender. This may give you some insight into the way they will present their proposals.

Whilst asking questions do not deny others the opportunity of also doing so. Never ask questions which are either irrelevant or likely to cause offence. The occasion is one at which to market your ability, but this should be done tactfully. Allow the questions you ask to express your company's expertise. Seek information in detail on those points in the tender documentation which you consider most onerous.

Often you will find that the issuing authority has not fully considered the ramifications of some of the requirements they have stipulated in the invitation to tender.

In many instances the tender invitation has been compiled by personnel not involved in the actual activity and may include totally irrelevant terms and conditions. Having these problems drawn to their attention may result in these being disregarded or amended.

## Sit to be Seen

It is also important to understand the significance of where to position yourself at a pre-tender meeting. At all costs avoid being out of easy eye contact with the contractor's personnel.

Do not consider you should sit as close as possible to the authority's personnel if this results in loss of eye contact: speakers wish to convey their message to as many people present as possible at pre-tender meetings; they wish it to be seen that they are distributing their attention fairly.

They will not, therefore, be comfortable in maintaining eye contact which excludes others. Therefore, position yourself where you can be seen whilst allowing the speakers to scan those around you easily. As a general rule, sit left or right of centre opposite the speakers.

Build Recognition

When asking your questions, introduce your name and company name and indeed repeat your company name as frequently as possible. This will ensure you are remembered after the meeting is concluded, when those holding the meeting will carry out an appraisal of the meeting, often only a brief interchange with other authority personnel.

Equal Consideration

Never consider one representative on the panel as more important than another. It is surprising how often the obvious junior member on the panel is excluded from expressions of appreciation. Remember, when you leave the meeting, they will be included in the authority's deliberations and the fact that you thanked them will have increased their self-esteem and result in their higher opinion of you and your company; this will be reflected in their conversations with senior personnel at a later time.

In Summary

a) Always seek and attend a pre-tender meeting.
b) Prepare all questions prior to the meeting in written format.
c) Never go alone.
d) Ask questions which show your professional ability.
e) Do not dominate the proceedings.
f) Listen to others and note their questions and the answers they receive.
g) Take notes, either recorded or written.
h) Choose seats which allow you easy eye contact with the speakers.
i) Nod in appreciation on points made by the speaker (this reassures the speaker, makes him seek that reassurance, and thereby increases the likelihood of his directing his speech to yourself and consequently improves your profile in his consideration).
j) Treat all the authority's staff with equal appreciation and consideration.
k) Do not ask irrelevant or silly questions.
l) Make sure your questions are rounded.
m) Don't only ask about financial points or quality points, show through questions you understand all facets of the contract.
n) Do not be afraid to seek clarification.