

Bidding and Tendering

National Occupational Standards

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No.	NOS Title
INSBTP001	Evaluate and develop your organisation's ability to bid
INSBTP002	Prepare to bid
INSBTP003	Plan the bid
INSBTP004	Write and submit the bid
INSBTP005	Undertake post-submission activities

Evaluate and develop your organisation's ability to bid

Overview

This standard is for you if you are involved in evaluating and developing your organisation's ability to bid. It is relevant to in-house bid managers, other related professionals, technical specialists, marketing, sales and business development teams and business owners.

Performance criteria

You must be able to:

1. define your organisation's approach to bidding using the corporate strategy
2. carry out a research and gather market intelligence to support your organisation's decision to bid
3. analyse information on activities of potential customers and competitors
4. evaluate your organisation's ability to bid and its probability of success by taking into account the available budget, skills and capacity to deliver both the bid and the contract
5. collate your organisation's bidding strengths, differentiators, and any unique selling point(s)
6. develop the appropriate relationships within your organisation to ensure that staff involved in the bidding have the required skills and support
7. develop and implement an Opportunity Management System (OMS) to ensure that the appropriate bidding opportunities are identified
8. prepare your organisation's bid library from the past bids, outcomes, case studies and other supporting materials and update it accordingly
9. seek and develop the appropriate relationships with potential customers / funders
10. ensure that key bid target groups and specific targets are in line with your organisation's business strategy and its attitude to risk management
11. collate the appropriate processes and procedures for bid development and review these regularly in line with changing best practice(s).

Knowledge and understanding

You need to know and understand:

1. the relevant legal, regulatory and ethical requirements that relate to bidding and its potential delivery
2. the current best practice(s) and appropriate bodies of knowledge relevant to bidding
3. your organisation's position in the market and how the corporate strategy fits into it
4. the relevant procurement frameworks, including the EU procedures and purchasing thresholds and minimum buyer standards, policies and preferences
5. the methods of research, gathering market intelligence and analysing information on activities of potential customers and competitors
6. the relevant techniques for assessing your organisation's bidding strengths, differentiators, and any unique selling point(s)
7. how to develop and implement an opportunity management system for your organisation in relation to bidding
8. the links between the bidding process and your organisation, and the importance of these in identifying the opportunities to bid
9. how to structure and develop your company's bid library and ensure that the information is kept up to date
10. the factors that must be considered when evaluating your organisation's ability to bid
11. how to source the appropriate skills and maintain their relevance to bidding activities
12. how to ensure that processes and procedures for bid development are in place and remain fit for purpose.

Skills

- Data collection and research
- Information management
- Planning
- Reporting
- Strategic thinking

Glossary

Best and Final Offer (BAFO): a customer request for a document that describes an organisation's final price. The customer will request this after the bid has been submitted to help select the final companies to negotiate with. (Source: APMP – Glossary of terms – amended)

Bid library: a repository of texts and resources which can be used in bids, usually stored and searched electronically.

Bid (tender or proposal): refers to the documents required to be submitted in response to a formal invitation to bid (ITB). These may include the prescribed bid response form/questionnaire, drawings, specifications, time lines, charts, price breakdowns, etc.

Commissioning: is a structured way of deciding how and on whom public money should be spent.

Expression of Interest (EOI): is used to identify potential suppliers interested in, and capable of, delivering the required goods or services. Potential suppliers are asked to provide information on their capability to do the work. It is usually the first stage of a multi-stage tender process.

Invitation to Tender (ITT) or Request for Proposal (RFP): is a formal invitation to make an offer for the supply of goods or services.

Opportunity Management System (OMS): is a system that provides information on sales leads or opportunities, along with other supporting information. Typically, these systems provide a visual interface that organises certain kinds of data like customer or potential customer identifiers, transaction status, past purchases and other relevant information that will help to assist sales teams. (Source: techopedia.com)

Pre-qualification questionnaire (PQQ): is a questionnaire assessing the suitability of an organisation's commercial, technical and financial capability and provides a method of shortlisting interested parties meeting the required minimum qualification criteria.

Procurement: a system in which organisations seeking a product or service allow other companies or individuals to submit competing offers to win the right to provide the requested product or service or be on the framework to provide a product or service. The process may involve a number of stages including: expression of interest, pre-qualification questionnaire, invitation to tender, request for proposal and best and final offer.

Purchasing guidelines or procedures: a set of steps that an organisation follows when making purchases of goods or services, which may also include contract value thresholds, triggering different levels of process detail.

Evaluate and develop your organisation's ability to bid

Links to other NOS

CFASAL005 Develop sales strategies and plans

CFAPSU013 Contract for major programmes and projects in procurement and supply

External Links

Official Journal of the European Union www.ojec.com

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Suite	Bidding and Tendering
Keywords	Bidding; tendering; procurement; bid library, proposals; bids; tenders; ITT; PQQ; RFP; EOI, BAFO, OMS

Overview

This standard is about preparing to bid. It focuses on all activities involved prior to making a 'bid no bid' decision. It is relevant to in-house bid managers, other related professionals, technical specialists, marketing, sales and business development teams and business owners.

Performance criteria

You must be able to:

1. plan all relevant activities to influence the buyer or funder to increase your organisation's probability of bidding success
2. select the opportunities to bid in line with your organisation's business strategy
3. agree on the types of information gathered from research and the approach to be taken in analysing it
4. collate the resources for analysis and agree on timescales for completion
5. obtain all relevant information about the bid to appraise pre-bid understanding and the bid opportunity capture strategy
6. collect and analyse the relevant information on the opportunity, including the buyer's/funder's policies, the market, key stakeholders, competitors, and the offer type to improve your organisation's competitive advantage
7. obtain all relevant bidding documents and seek any necessary clarification from the customer
8. identify and prioritise the resources and expertise required to fulfil the bidding request
9. assess all risks associated with the bid type
10. present the 'bid no bid' proposal to senior managers / directors
11. consult with the internal and external stakeholders on 'bid no bid' decision and seek guidance from appropriate experts where required
12. make recommendations on the 'bid no bid' decision based on associated costs and benefits of bidding
13. approve the bid action plan and timings for completion with decision makers

Knowledge and understanding

You need to know and understand:

1. the relevant legal, regulatory and ethical requirements that relate to bidding
2. the current best practice(s) relevant to bidding
3. the principles of the bid opportunity capture strategy
4. the methods of obtaining the relevant types of information
5. the key marketing techniques and ethics involved in influencing business activities
6. the sources of relevant information, methods of collecting it and analysing different types of data
7. how to choose the appropriate approaches to information research
8. the different approaches to resourcing bids and the circumstances applicable
9. how to carry out a risk assessment
10. the organisational procedures for checking the relevant contractual terms
11. the sources of available expertise
12. how to produce 'bid no bid' recommendations, based on evidence and analysis of strategic and contextual factors

Skills

- Analytical thinking
- Decision-making
- Influencing
- Planning
- Research

Glossary

Capture planning: is the process of identifying opportunities, assessing the environment, and implementing winning strategies oriented towards capturing a specific business or funding opportunity.

Capture strategy: (sales or win strategy) is a plan to win a specific opportunity. (Source: APMP – Glossary of terms)

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Keywords	Bid; tender; research, risk assessment, data analysis, capture planning; capture strategy; prepare to bid

Overview

This standard is for you if you are involved in planning the bid. It focuses on the relevant actions and procedures involved prior to writing and submitting your bid. It is relevant to in-house bid managers, other related professionals, technical specialists, marketing, sales and business development teams and business owners.

Performance criteria

You must be able to:

1. collate all relevant bid documentation and obtain confirmation of the 'bid no bid' decision
2. conduct due diligence audit to adhere to the relevant standard(s) of care in relation to bidding activities and opportunities
3. assign a bid manager and establish a team of professionals to work on the bid, allocate all relevant roles and responsibilities
4. guide the bid team to build the most appropriate solution(s) in accordance with the customer's requirements
5. evaluate the suitability of the bid against the criteria specified in the Invitation to Tender (ITT) and establish the percentage of likelihood of being successful
6. propose a potential strategy, solutions and approaches to the bid in consultation with the bid team and key stakeholders to maximise success chances in line with the bid assessment/scoring criteria
7. create a bid schedule, showing resources, key milestones, deadlines, review dates and deliverables
8. confirm bid submission requirements, agree and develop the presentation format for the bid by using the relevant templates
9. develop your organisation's strategic plan with bidding opportunities to define organisational direction and goals
10. where appropriate, review the opportunity capture strategy/solution and re-assess the 'bid no bid' decision

Knowledge and understanding

You need to know and understand:

1. all relevant legal, regulatory and ethical requirements relating to the bid
2. the current best practice(s) relevant to bidding
3. the appropriate process for collating all bid documentation
4. how to obtain the information required to develop a bid plan
5. the relevant principles of bid suitability evaluation against the criteria specified in the proposal
6. how to interpret assessment/scoring criteria and evaluate the likelihood of success
7. how to develop your organisation's strategic plan to amplify the service development potential
8. how to select and apply the most appropriate format, design and writing style for a bid and document planning approaches
9. the submission requirements, relevant actions and solutions in relation to bid opportunity capture strategy
10. the methods of re-assessing the 'bid no bid' decision

Skills

- Creative thinking
- Critical thinking
- Developing processes and procedures
- Evaluation
- Planning
- Team working
- Strategic thinking

Glossary

Assessment/scoring criteria: refer to the standards of judgement and ranking or to the priority used to assess offers and compare alternatives put forward by respondents to quotes and tender. Some examples of scoring criteria include: Most Economically Advantageous Tender (MEAT), Best Value and Lowest Price Technically Acceptable.

Bid manager: the person responsible for leading the bid. This could be a dedicated full-time role or an additional role for an existing member of staff.

Bid team: a group or an individual responsible for developing the bid solution and deliverables.

Capture planning: is the process of identifying opportunities, assessing the environment, and implementation of winning strategies aimed at capturing a specific (usually larger scale) business opportunity.

Due Diligence (DD): is an audit of a business or a responsible person prior to signing a contract. DD also refers to the investigation a seller does of a buyer. The items that may be considered are whether the buyer has adequate resources to complete the purchase, as well as other elements that would affect the acquired entity or the seller after the sale has been completed.

Invitation to Tender (ITT): is a procedure for generating competing offers from different bidders looking to obtain an award of business activity in works, supply, or service contracts.

Links to other NOS

CFAM&LFA5 Manage projects

CFASAL012 Develop sales proposals and quotations

Plan the bid

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Suite	Bidding and Tendering
Keywords	Bidding; tendering; proposals; plan the bid; assessment/scoring criteria; bid team; bid manager; capture planning

Overview

This standard is for you if you are involved in writing and / or submitting the bid. It is relevant to in-house bid managers, other related professionals, technical specialists, marketing, sales and business development teams and business owners.

Write and submit the bid

Performance criteria

You must be able to:

1. confirm the relevant design, terminology, writing style and format for the bid and any other templates or specific writing instructions
2. agree on the overall bid solution and individual sections or the answer plans
3. confirm the relevant professionals' roles and responsibilities for writing and contributing to sections of the bid within the internal team or externally, where appropriate
4. adopt clear and consistent corporate writing style using the language appropriate for the audience
5. stress out your organisation's unique selling propositions, key differentiator(s), solutions, and benefits to demonstrate how the offer adds the value and meets or exceeds the buyer's / funder's requirements
6. draft the bid in line with the sections or the answer plans, liaise with other bid team members and consult the key stakeholders
7. ensure that the draft bid takes account of market research and conforms with the requirements set out in the bid documentation
8. keep track of version control of all bid related documents during the writing process
9. conduct the relevant team reviews, proofreading of the draft at all key development stages to ensure readability, style consistency and fitness to bid requirements are maintained
10. apply the win themes and bidder strategies across all relevant documents
11. conduct a compliance check against a bid checklist or a compliance matrix and sign off the bid
12. submit the bid in line with the bid plan and obtain confirmation of receipt.

Knowledge and understanding

You need to know and understand:

1. the relevant legal, regulatory and ethical requirements that relate to bidding
2. the current best practice(s) relevant to bidding activities
3. your organisation's guidelines for bid writing including in-house or generic style guides
4. the bid formats, designs and writing styles
5. the written communication techniques and the correct use of grammar and punctuation
6. how to draw on research results and use the past bids as part of the drafting process
7. how to control and maintain documents' consistency during writing process by using configuration management
8. the methods of proofreading and editing
9. the different methods of reviewing the bid, including peer, colour team and executive reviews
10. the organisational procedure for managing, protecting and storing all bid documentation
11. how to carry out the compliance check by using the compliance matrix or checklist
12. how to submit the bid.

Skills

- Bid project management
- Giving and receiving constructive feedback
- Lone working skills
- Team working skills
- Proofreading, editing
- Time management
- Question analysis
- Interpretation
- Writing

Glossary

Answer plan: sets out the structure for the proposed answer to the bid. An answer plan can include tools and techniques such as storyboarding, bid skeleton, page plan, mock-up, etc.

Bid solution: the bid solution, at this stage, has been reviewed and agreed and covers the way in which products or services will be delivered as a result of a contract being awarded.

Configuration management: A discipline applying technical and administrative direction and surveillance to: (1) identify and document the functional and physical characteristics of a configuration item; (2) control changes to those characteristics; and (3) record and report changes to processing and implementation status. (Definition from the Free Dictionary - amended)

Compliance matrix: is a table that shows where the buyer / funder requirements are addressed across the proposal. It may map requirements down to the section or page of the proposal, showing where these are answered and show word counts, etc.

Colour team reviews: are often conducted as part of a business development and proposal process.

- Blue team reviews: reviews and updates initial capture strategy and capture plan (especially in a larger bid team).
- Red team reviews: reviews final proposal draft - including price and budget - to predict how the buyer / funder may score the proposal.
- Pink team review: reviews storyboards and mock-ups (plans of bid content) to confirm solution set and to validate proposal strategy.
- Gold team review: an approval of final proposal and price.
- Black team review: predicts one or more competitor solutions.

Win themes: are higher level features and benefits that transcend the entire proposal. Win themes aim to bring out the best features the customers are looking for - typically low cost, low risk, proven solutions, innovation, or performance-based accountability.

Links to other NOS

CFABAA211 Produce documents in a business environment

Write and submit the bid

CFABAA614 Prepare to communicate in a business environment

CFABAA615 Communicate in a business environment

CFASAL012 Develop sales proposals and quotations

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Undertake post-submission activities

Overview

This standard is for you if you are involved in the bid post-submission activities. It is relevant to in-house bid managers, other related professionals, sales, marketing and business development teams, quality assurance teams and business owners.

Undertake post-submission activities

Performance criteria

You must be able to:

1. respond to customer request(s) for further information to support the bid, if required
2. take part in post submission activities as requested by the buyer / funder
3. make amendments to the bid in line with the customer's feedback, and re-submit
4. receive the final customer decision and obtain customer's feedback on the bid
5. review your organisation's bidding process, identifying reasons why the bid was successful / unsuccessful
6. seek further clarification on the decision from the buyer / funder, and where appropriate, decide on whether to appeal or lodge a complaint
7. ensure the bid and supporting documentation are added to the bid library, or suitably filed for future reference
8. obtain and analyse the feedback from the bid team and the key stakeholders
9. identify the lessons learnt for your organisation's future bids
10. agree and implement an action plan based on lessons learnt review
11. ensure that lessons learnt are incorporated within your organisation's bid strategy.

Undertake post-submission activities

Knowledge and understanding

You need to know and understand:

1. the relevant legal, regulatory and ethical requirements that relate to bidding
2. the current best practice(s) relevant to the bid post-submission activities
3. how to collate and provide further information to support the bid
4. the standard post-submission activities, such as clarification questions, all relevant paperwork, presentations, demonstrations, scenario days, site visits
5. the negotiation, competitive dialogue and e-auction processes, including how to achieve a realistic final offer
6. the methods for obtaining feedback from buyers / funders
7. the relevant legal framework of the bidding process and the factors to consider before making an appeal or lodging a complaint
8. the methods of collecting and analysing the bid process experience to generate lessons learnt
9. how to use lessons learnt to improve your organisation's bidding processes and chances of future success
10. how to incorporate lessons learnt into your organisation's strategy.

Undertake post-submission activities

Skills

- Business strategy
- Interpersonal skills
- Information collection and analysis
- Negotiating
- Presentation skills
- Process evaluation

Glossary

E-auctions: electronic auctions (or reverse electronic auctions) are on-line auctions where selected bidders submit offers electronically against the purchaser's specification. All communication following and including the invitation to pre-qualified bidders to submit new prices and/or values must be electronic.

Lessons learnt: is knowledge or understanding gained by experience that has a significant impact for an organisation. The experience may be either positive or negative. Successes are also sources of lessons learnt.

Links to other NOS

CFABAA617 Develop a presentation

CFABAA623 Deliver a presentation

CFABAG124 Negotiate in a business environment

External Links

Gov. UK – How to make a freedom of information (FOI) request

<https://www.gov.uk/make-a-freedom-of-information-request/the-freedom-of-information-act>

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