# Lecture 26

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.

The role of tender manager is explained separately and thoroughly in lecture named “Role of Tender Manager".

General Principles

The following general principles are suggested while preparing a tender response:

# ♦ Presentation

# ♦ Format

# ♦ Consultation

# Presentation

* It is important to ensure your tender response is clearly and precisely displayed.
* Avoid handwritten presentations, even the neatest writer tends to lose clarity after a time.
* Use a type size one point larger than the issuing authority's document if possible. This displays your response clearly.
* Normally correction made by the use of correction fluid (white fluid) are not acceptable to most of the organizations. Hence, tenderers should sign with date and stamp, all corrections and overwriting.
* All signatures in tender document should be dated as well as the pages of all sections of tender document should be signed at the lower right hand corner wherever required in the tender paper by the tenderer or by a person holding power of attorney authorizing him to sign on behalf of the tenderer before submission of tender.
* Prepare covers and covering letters depending on tender system and requirements of the tender.
* Make sure that you have enclosed right documents in right cover.

# Format

* Present your offer in a simple format. Tenders will be judged of contents, not on elaborate presentation.
* Clearly demonstrate (not merely assert) your ability to fulfil the mandatory criteria.
* Think about how you would evaluate the tender response if you were the officer receiving and evaluating it.
* 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 purchase 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.

* Fill up all the details and required format and annexure without making any addition or alterations
* Attach all required documents and earnest money.

# Consultation

* Submissions should be prepared either by someone experienced in the field, or, in close consultation with an experienced person.
* Although time lines are often restrictive, a team approach, or at least consultation with colleagues, will help to ensure all aspects of the project have been addressed. If possible, involve proposed project participants in the process.
* Ensure that the project specifications are specific and unambiguous. Clarify any confusing clues with the purchasing authority. A contact name and number should be provided in the Project Brief/Specification.
* Cost the project using th costing performa provided and allow for commercial costing rates. Retain this costing sheet as a record. It will form the basis of the project budget should the submission be successful.
* At this point it would be useful to anticipate the staff requirements for the project and determine availability of staff.

# Required documents

Even though there is no standard to documents required to be

submitted along with tenders, following documents should be always

ready with you.

Copy of National Identity Card of the authorized signatory.

Memorandum and article of association is case of limited company or partnership deed in case of partnership firm duely attested by competent authority.

Sales Tax Registration Certificate.

Certificate for ISO or equivalent standard.

Latest Income Tax Certificate. The Income Tax Certificate should be in the name of the company/individual quoting for the tender.

Details of similar works executed in last three years, document with names and postal address of clients along with copies of letters of indent, work orders, completion certificate and other documents in evidence of execution of work by the tenderers.

Details of concurrent commitments giving contract values, details of works, date of commencement of work, percentage completed as on date and schedule date of completion.

Profile of your organization.

i Power of attorney in favour of the person who is signing the tender documents.

i Certificate from Bankers.

i Audited balance sheet and profit and loss account statement duly certified by a chartered accountant in practice, for the last three years.

. Any other technical details/data sheet etc. related to your product range.

* Import license in case of F.O.B and C & F tenders.
* Agency agreement certificate in case of foreign principals.

# Final Compilation

* Take two copies of unmarked tender documents for compilation.
* Complete and compile your tender response remembering your supportive information.
* Check and recheck that you have completed the tender as specified by the client.
* Check your enclosures and affix a covering letter denoting the order of your presentation and a brief description of each item.
* 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.
* 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.
* 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.
* 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.