

## Overview

This standard is about bidding for contracts to supply products and services following a formal tendering process. You identify tender opportunities, carry out targeted research amongst customers, and evaluate your organisation's capability and capacity to respond. You prepare tenders with financial quotations and present them to potential customers. You also evaluate potential trade-offs and respond to queries and objections. The standard includes negotiating contracts and asking for feedback to improve future bids.

This standard is for all managers and leaders.

## Performance criteria

### *You must be able to:*

1. engage colleagues and stakeholders in obtaining contracts to supply products and services
2. maintain systems to identify opportunities to bid to supply products and services
3. carry out targeted research amongst existing and potential customers to identify opportunities to tender to supply products and services
4. evaluate your organisation's capacity and capability to respond to opportunities to tender to supply products and services credibly and competitively
5. collaborate on tenders with other organisations with complementary capabilities, where appropriate
6. prepare tenders in line with customers' requirements, emphasising your organisation's capacity and capability and the unique features and potential benefits of your products and services
7. prepare financial quotations that take account of your organisations' financial objectives, the customer's ability to pay and your estimates of competitors' quotations
8. present your bids to potential customers, anticipating or pre-empting any queries and objections
9. evaluate potential trade-offs which will be beneficial both to the customer and to your organisation
10. respond to any queries or objections from potential customers
11. check the potential customers understand and accept your responses to objections and queries
12. negotiate contracts that meet both the new customer's and your organisation's requirements
13. ensure formal agreements are drawn up and signed which meet legal requirements
14. obtain feedback from customers identify how you can improve, in cases where you fail to obtain contracts
15. review the tendering process with colleagues and use the lessons learned to improve future bids
16. follow the legal, organisational, codes of practice and policies relevant to bidding for contracts

## Knowledge and understanding

*You need to know and understand:*

### **General knowledge and understanding**

1. how to engage colleagues and stakeholders in obtaining contracts to supply products and services
2. the communication skills including active listening, asking different types of questions, clarifying points, and restating or rephrasing statements to check mutual understanding
3. how to conduct research to identify sales opportunities
4. how to prepare tenders which emphasise your organisation's capacity and capability and the unique features and benefits of your products and services
5. how to calculate the cost of supplying products and services and prepare competitive financial quotations
6. how to present tenders clearly and convincingly, anticipating customers' queries or objections, and how to do so
7. the importance of identifying trade-offs, whereby particular aspects of your offer might be enhanced whilst others of lesser importance might be reduced, and how to do so
8. the principles and methods of negotiation and how to reach agreements that are a 'win-win', to meet both the customer's and your organisation's requirements
9. what agreements to supply products and services should cover and how to draw these up
10. the importance of seeking feedback from customers to improve future tenders
11. the importance of reviewing the tendering process and identifying the lessons to be learned

### **Industry and sector specific knowledge and understanding**

12. the industry and sector requirements, guidelines and codes of practice for procurement

13. the legal, organisational, codes of practice and policies relevant to bidding for contracts

**Context specific knowledge and understanding**

14. your organisation's financial objectives, stakeholders, tendering requirements, contractual requirements, products and services and their features and potential benefits to customers

15. your organisation's existing and potential customers, their needs and motivations

16. your organisation's capacity and capability to supply products and services

17. other organisations that your organisation can collaborate with on tenders, including existing collaborators and potential new ones

## Skills

1. Analysing
2. Communicating
3. Evaluating
4. Information management
5. Innovating
6. Involving colleagues
7. Negotiating
8. Networking
9. Obtaining feedback
10. Persuading
11. Planning
12. Presenting information
13. Prioritising
14. Reviewing
15. Thinking strategically
16. Thinking with a focus on customers

Bid for contracts to supply products and services

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**Suite** Management and Leadership, Treework

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