Bidding and Tendering

National Occupational Standards

November 2013
<table>
<thead>
<tr>
<th>No.</th>
<th>NOS Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>CFABAT001</td>
<td>Evaluate and develop the organisation’s ability to bid</td>
<td>1</td>
</tr>
<tr>
<td>CFABAT002</td>
<td>Prepare to bid</td>
<td>7</td>
</tr>
<tr>
<td>CFABAT003</td>
<td>Plan the bid</td>
<td>12</td>
</tr>
<tr>
<td>CFABAT004</td>
<td>Write and submit the bid</td>
<td>17</td>
</tr>
<tr>
<td>CFABAT005</td>
<td>Undertake post-submission activities</td>
<td>25</td>
</tr>
</tbody>
</table>
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 professionals and those advising and supporting them.
Evaluate and develop the organisation’s ability to bid

Performance criteria

You must be able to:

P1  gather and analyse market intelligence and information on the activities of potential customers and competitors
P2  assess the organisation’s bidding strengths, differentiators, and any unique selling point(s)
P3  develop appropriate relationships with potential customers / funders
P4  develop and implement an opportunity management system in order to ensure that appropriate opportunities to bid are identified
P5  ensure that key bid target groups and specific targets are in line with the organisation’s business strategy and the organisation’s attitude to risk
P6  develop a bid library of past bids and outcomes, case studies and wider supporting materials and ensure that it is regularly updated
P7  evaluate the organisation’s ability to bid taking into account the probability of success, the available budget, skills and capacity to deliver both the bid and the contract
P8  ensure that self and others involved in bidding have the appropriate skills and support
P9  ensure that appropriate processes and procedures for bid development are in place and are regularly reviewed in line with changing best practice
Knowledge and understanding

You need to know and understand:

K1 appropriate legal, regulatory and ethical requirements that relate to bidding and delivery
K2 current best practice and appropriate bodies of knowledge relevant to bidding
K3 the organisation’s position in the market and strategy
K4 procurement frameworks, including EU procedures and purchasing thresholds and minimum buyer standards, policies and preferences
K5 methods of gathering and analysing market intelligence and information on potential customer and competitor activity
K6 techniques for assessing an organisation’s bidding strengths, differentiators, and any unique selling point(s)
K7 how to develop and implement an opportunity management system for an organisation
K8 the links between the bidding process and wider organisation, and the importance of these in identifying opportunities to bid
K9 how to structure and develop a bid library and ensure that the information is kept up to date
K10 the factors that must be considered when evaluating an organisation’s ability to bid
K11 how to source appropriate skills and support relevant to bid tasks
K12 how to ensure that processes and procedures for bid development are in place and remain fit for purpose
Additional information

**Skills:**
- Analysing
- Data collection
- Information management
- Planning
- Reporting
- Strategic thinking

**Glossary:**

**Procurement:** a system in which organisations seeking a product or service allow other companies or individuals to submit competing offers in order 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.

**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.

**Pre-qualification questionnaire (PPQ):** 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.

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

**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)*

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

**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.

**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.

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

**Links to other NOS**:  
- CFASLS12 Analyse competitor information  
- CFASLS13 Use databases to support sales activities  
- CFASLS22 Develop responsible sales strategies and plans  
- CFAM1.3.3. Establish and understand potential market segments  
- CFASLS97 Develop strategic relationships with major clients

**External Links**:  
<table>
<thead>
<tr>
<th><strong>Developed by</strong></th>
<th>Skills CFA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Version number</strong></td>
<td>1</td>
</tr>
<tr>
<td><strong>Date approved</strong></td>
<td>December 2013</td>
</tr>
<tr>
<td><strong>Indicative review date</strong></td>
<td>December 2016</td>
</tr>
<tr>
<td><strong>Validity</strong></td>
<td>Current</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Original</td>
</tr>
<tr>
<td><strong>Originating organisation</strong></td>
<td>Skills CFA</td>
</tr>
<tr>
<td><strong>Original URN</strong></td>
<td>CFABAT001</td>
</tr>
<tr>
<td><strong>Relevant occupations</strong></td>
<td>Purchasing managers and directors; Buyers and procurement officers; Business sales executives; Marketing associate professionals; Sales accounts and business development managers; Management consultants and business analysts</td>
</tr>
<tr>
<td><strong>Suite</strong></td>
<td>Bidding &amp; Tendering (2013)</td>
</tr>
<tr>
<td><strong>Key words</strong></td>
<td>Bidding; tendering; proposals; bids; tenders; ITT; PQQ; RFP; EOI</td>
</tr>
</tbody>
</table>
Overview

This standard is about preparing to bid. It focuses on activities that need to be undertaken prior to making a ‘bid no bid’ decision.

It is relevant to sales and marketing teams, bid and funding professionals and business owner / managers.
Performance criteria

You must be able to:

P1 where appropriate, undertake activities to influence the buyer or funder in order to increase the organisation’s probability of success
P2 select opportunities to bid in line with the organisation’s business strategy
P3 obtain relevant information about the bid in order to inform pre-bid understanding and bid opportunity capture strategy
P4 agree the information to be gathered and the approach to be taken
P5 plan the research and agree timescales and resources
P6 collect and analyse valid information on the opportunity, including the any buyer/funder policy, the market, relevant stakeholders, competitors, and the offer type, in order to improve competitive advantage
P7 obtain bidding documents and seek any necessary clarification from the customer
P8 identify and prioritise the resources and expertise required to fulfil bidding
P9 assess risks associated with the bid type
P10 consult with internal and external stakeholders and seek guidance from appropriate experts where necessary
P11 make recommendations to inform the bid no bid decision based on cost to bid and benefits of bidding
P12 agree a bid action plan and timings with decision makers
## Knowledge and understanding

You need to know and understand:

<table>
<thead>
<tr>
<th>K1</th>
<th>appropriate legal, regulatory and ethical requirements that relate to bidding</th>
</tr>
</thead>
<tbody>
<tr>
<td>K2</td>
<td>current best practice relevant to bidding</td>
</tr>
<tr>
<td>K3</td>
<td>the principles of a bid opportunity capture strategy</td>
</tr>
<tr>
<td>K4</td>
<td>the types of information that are relevant and how to obtain them</td>
</tr>
<tr>
<td>K5</td>
<td>key marketing techniques and ethics involved in influencing business activities</td>
</tr>
<tr>
<td>K6</td>
<td>common approaches to research</td>
</tr>
<tr>
<td>K7</td>
<td>sources of valid information, and methods of collecting and analysing different types of information and data</td>
</tr>
<tr>
<td>K8</td>
<td>different approaches to resourcing bids and the circumstances in which these might be applied</td>
</tr>
<tr>
<td>K9</td>
<td>how to undertake a risk assessment</td>
</tr>
<tr>
<td>K10</td>
<td>organisational procedures for checking contractual terms</td>
</tr>
<tr>
<td>K11</td>
<td>sources of available expertise</td>
</tr>
<tr>
<td>K12</td>
<td>how to produce bid no bid recommendations, based on evidence and analysis of strategic and contextual factors</td>
</tr>
</tbody>
</table>
Additional information

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: (or sales or win strategy) is a plan to win a specific opportunity.

(Source: APMP – Glossary of terms)
<table>
<thead>
<tr>
<th>Developed by</th>
<th>Skills CFA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version number</td>
<td>1</td>
</tr>
<tr>
<td>Date approved</td>
<td>December 2013</td>
</tr>
<tr>
<td>Indicative review date</td>
<td>December 2016</td>
</tr>
<tr>
<td>Validity</td>
<td>Current</td>
</tr>
<tr>
<td>Status</td>
<td>Original</td>
</tr>
<tr>
<td>Originating organisation</td>
<td>Skills CFA</td>
</tr>
<tr>
<td>Original URN</td>
<td>CFABAT002</td>
</tr>
<tr>
<td>Relevant occupations</td>
<td>Chief executives and senior officials; Purchasing managers and directors; Buyers and procurement officers; Business sales executives; Marketing associate professionals; Sales accounts and business development managers; Management consultants and business analysts</td>
</tr>
<tr>
<td>Suite</td>
<td>Bidding &amp;Tendering (2013)</td>
</tr>
<tr>
<td>Key words</td>
<td>Bid; tender; capture planning; capture strategy; prepare to bid</td>
</tr>
<tr>
<td><strong>Overview</strong></td>
<td>This standard is for you if you are involved in planning a bid. It focuses on what must be done prior to writing and submitting your bid.</td>
</tr>
<tr>
<td>--------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>It is relevant to bid professional and bid advisors.</td>
</tr>
</tbody>
</table>
Performance criteria

You must be able to:

P1 obtain full bid documentation and confirm bid no bid decision

P2 assign a bid manager and establish a bid team to work on the bid, defining roles and responsibilities where appropriate

P3 create a bid schedule, showing key milestones, resources, review dates and deliverables

P4 propose potential strategy, solutions and approaches to the bid in consultation with any bid team and key stakeholders to maximise success chances in line with the bid assessment/scoring criteria

P5 select the most appropriate solution for the bid

P6 confirm submission requirements, and agree and develop the presentation format for the bid and any templates to be used

P7 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:

K1 appropriate legal, regulatory and ethical requirements that relate to bidding
K2 current best practice relevant to bidding
K3 the appropriate process for obtaining the full bid documentation
K4 the information required to develop a bid plan and how to obtain it
K5 how to develop potential solutions to bids and to select the most appropriate option
K6 how to interpret assessment/scoring criteria
K7 common submission formats, designs, and writing styles, and document planning approaches
K8 how to select the most appropriate format, design and writing style for a bid
**Skills:**
- Creative thinking
- Critical thinking
- Developing processes and procedures
- Evaluation
- Planning
- Team working

**Glossary:**

**Assessment/scoring criteria:** refers to standards of judgement, and ranking or priority that are 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 team:** a group or individual responsible for developing the bid solution and deliverables.

**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.

**Capture planning:** is the process of identifying opportunities, assessing the environment, and implementing winning strategies oriented towards capturing a specific (usually larger scale) business opportunity

**Links to other NOS:**
- CFAM&LFA5 Manage projects
- CFASLS45 Work with other business functions
- CFASSLS51 Develop sales proposals and quotations
## CFABAT003 Plan the bid

<table>
<thead>
<tr>
<th>Developed by</th>
<th>Skills CFA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version number</td>
<td>1</td>
</tr>
<tr>
<td>Date approved</td>
<td>December 2013</td>
</tr>
<tr>
<td>Indicative review date</td>
<td>December 2016</td>
</tr>
<tr>
<td>Validity</td>
<td>Current</td>
</tr>
<tr>
<td>Status</td>
<td>Original</td>
</tr>
<tr>
<td>Originating organisation</td>
<td>Skills CFA</td>
</tr>
<tr>
<td>Original URN</td>
<td>CFABAT003</td>
</tr>
<tr>
<td>Relevant occupations</td>
<td>Chief executives and senior officials; Purchasing managers and directors; Buyers and procurement officers; Sales accounts and business development managers</td>
</tr>
<tr>
<td>Suite</td>
<td>Bidding &amp;Tendering (2013)</td>
</tr>
<tr>
<td>Key words</td>
<td>Bidding; tendering; proposals; plan the bid; assessment/scoring criteria; bid team; bid manager; capture planning</td>
</tr>
</tbody>
</table>
This standard is for you if you are involved in writing and / or submitting a bid.

It is relevant to in-house bid professionals, technical specialists, marketing, sales and business development teams and business owner / managers.
**Performance criteria**

**You must be able to:**

P1  confirm the design, terminology, format and writing style for the bid and any templates or specific instructions which apply

P2  agree the overall bid solution and individual section or answer plans

P3  confirm responsibilities for writing and contributing to sections of the bid within the bid team or externally, where appropriate

P4  draft the bid in line with the section or answer plan, liaising with other bid team members and consulting key stakeholders, where appropriate

P5  ensure that the draft bid takes account of research and reflects the requirements set out in the bid documentation

P6  write clearly and persuasively in language appropriate for the audience, stressing the organisation’s differentiator(s), solution and benefits, and showing how the offer meets or exceeds the buyer or funder’s requirements and adds value

P7  maintain configuration management of versions during the writing process

P8  conduct appropriate reviews of the draft at key development stages to ensure readability, fit to bid requirements, win themes and bidder strategy

P9  conduct a compliance check against a bid checklist or compliance matrix

P10 submit the bid in line with the bid plan and obtain confirmation of receipt
Knowledge and understanding

You need to know and understand:

K1    appropriate legal, regulatory and ethical requirements that relate to bidding
K2    current best practice relevant to bidding
K3    the organisation’s guidelines for bid writing including house or generic style guides
K4    bid formats, designs and writing styles
K5    how to draw on research and past bids as part of the drafting process
K6    techniques of written communication and the correct use of grammar and punctuation
K7    methods of proofreading
K8    different methods of reviewing bids, including, peer, colour and executive reviews
K9    the organisational procedure for managing, protecting, and storing bid documentation
K10   how to undertake a compliance check
Additional information

Skills:

- Bid project management
- Giving and receiving constructive feedback
- Lone working skills
- Team working skills
- Proofreading
- 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.

**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 specifying and checking (1) the characteristics of an item or product; (2) controlling changes to it; and (3) recording and reporting changes to its 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 a limited number of higher level features and benefits that transcend the entire bid or proposal. Traditionally linked to commercial bids, the concept is of increasing relevance to and use in grant funding.

**Links to other NOS:**
- CFABAA211 Produce documents in a business environment
- CFABAA614 Prepare to communicate in a business environment
- CFABAA615 Communicate in a business environment
- CFASSLS51 Develop sales proposals and quotations
<table>
<thead>
<tr>
<th>Developed by</th>
<th>Skills CFA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version number</td>
<td>1</td>
</tr>
<tr>
<td>Date approved</td>
<td>December 2013</td>
</tr>
<tr>
<td>Indicative review</td>
<td>December 2016</td>
</tr>
<tr>
<td>Indicative review</td>
<td>Date</td>
</tr>
<tr>
<td>Validity</td>
<td>Current</td>
</tr>
<tr>
<td>Status</td>
<td>Original</td>
</tr>
<tr>
<td>Originating</td>
<td>Skills CFA</td>
</tr>
<tr>
<td>organisation</td>
<td></td>
</tr>
<tr>
<td>Original URN</td>
<td>CFABAT004</td>
</tr>
<tr>
<td>Relevant occupations</td>
<td>Chief executives and senior officials; Purchasing managers and directors; Buyers and procurement officers; Business sales executives; Marketing associate professionals; Sales accounts and business development managers</td>
</tr>
<tr>
<td>Suite</td>
<td>Bidding &amp; Tendering (2013)</td>
</tr>
<tr>
<td>Key words</td>
<td>Bidding; tendering; proposals; plan the bid; assessment/scoring criteria; bid team; bid manager; capture planning; win themes</td>
</tr>
</tbody>
</table>
CFABAT005
Undertake post-submission activities

Overview
This standard is for you if you are involved in post bid submission activities.

It is relevant to in-house bid professionals, sales, marketing and business
development teams, quality assurance teams and business owner/s and managers.
Performance criteria

You must be able to:

P1 respond to customer requests for further information to support the bid
P2 take part in post submission activities as required by the buyer / funder
P3 where appropriate, make amendments to the bid in line with feedback, and resubmit
P4 receive final customer decision and obtain feedback on the bid from the customer
P5 seek further clarification on the decision from the buyer / funder, and where appropriate, decide on whether to appeal
P6 review the bidding process, identifying reasons why the bid was successful / unsuccessful
P7 ensure the bid and supporting documentation are added to the bid library - or suitably filed - for future reference
P8 obtain feedback from the bid team and key stakeholders
P9 identify the lessons that can be learnt for future bids
P10 agree and implement an action plan based on lessons learnt
P11 ensure that lessons learnt are incorporated within the bid strategy and/or organisational strategy
Knowledge and understanding

You need to know and understand:

K1 appropriate legal, regulatory and ethical requirements that relate to bidding
K2 current best practice relevant to post-submission activity
K3 how to provide further information to support the bid
K4 typical post-submission activities such as clarification questions, presentations, demonstrations, scenario days
K5 negotiation, competitive dialogue and e-auction processes, including how to achieve a realistic final offer
K6 methods for obtaining feedback from buyers / funders
K7 the legal framework of the bidding process and the factors to consider before making an appeal
K8 methods of collecting and analysing the bid process experience to generate lessons learnt
K9 how to use lessons learnt to improve the organisation’s bidding processes and chances of success
K10 how to present lessons learnt to the organisation
Additional information

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
- CFAS6.4 Undertake sales demonstrations
- CFABAG124 Negotiate in a business environment

External Links: Gov. UK – How to make a freedom of information (FOI) request
<table>
<thead>
<tr>
<th>Developed by</th>
<th>Skills CFA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version number</td>
<td>1</td>
</tr>
<tr>
<td>Date approved</td>
<td>December 2013</td>
</tr>
<tr>
<td>Indicative review date</td>
<td>December 2016</td>
</tr>
<tr>
<td>Validity</td>
<td>Current</td>
</tr>
<tr>
<td>Status</td>
<td>Original</td>
</tr>
<tr>
<td>Originating organisation</td>
<td>Skills CFA</td>
</tr>
<tr>
<td>Original URN</td>
<td>CFABAT005</td>
</tr>
<tr>
<td>Relevant occupations</td>
<td>Chief executives and senior officials; Purchasing managers and directors; Buyers and procurement officers; Business sales executives; Marketing associate professionals; Sales accounts and business development managers</td>
</tr>
<tr>
<td>Suite</td>
<td>Bidding &amp;Tendering (2013)</td>
</tr>
<tr>
<td>Key words</td>
<td>Bidding; tendering; proposals; bids; tenders; post-submission activities; e-auctions; lessons learnt</td>
</tr>
</tbody>
</table>