Bidding Hints & Tips

Outlined below are some hints and tips to consider when bidding for any public sector contract.

Click on any of the down arrows to see more information.

Preparing to bid

Before you bid, you need to prepare your organisation:

Market Research

- Investigate your sector
- Research other procurement exercises which have been carried out, including who the winning supplier(s) were. This will help increase your market knowledge, including when future opportunities will be renewed

Procurement Systems

- Register on Public Contracts Scotland (PCS) by setting up a company profile. This will ensure you are notified of potential or current opportunities that are of interest to you
- Keep your PCS Supplier Finder profile up-to-date with current information/keywords so that procurement officers can find you to directly invite you to quote for low value contracts

Your Organisation

- We recommend you use a general email address/mailbox for your organisation's contact details on PCS that can be accessed by several people. This means that any PCS alerts on new contract opportunities will be sent to this general email for your organisation. This will minimise the likelihood of missing PCS alerts e.g. due to an employee being on leave
- Establish an internal process to allocate responsibility for picking up and actioning these alerts (including cover for sickness/leave, etc.)
- Investigate what training is available e.g. register with the Supplier Development Programme (if you are a micro, small or medium business) and Scottish Enterprise/ Business Gateway, etc.

Further preparation information can be found in Analyse your Business.

Understanding the key tender requirements

All procurement exercises are different so ensure you fully read (and reread) the procurement exercise documents to understand:

- What requirements you have to meet and when?
- What documents you need to complete, and in which format, to bid?
- What are the tender timescales e.g. the timescales for being able to raise questions with the procurement officer? the tender deadline?
- Are supplier days, site visits and/or presentations included in the process?

Some Contract Notices include the estimated budget for the contract: use this information to help you decide if your organisation should bid or not.

You need to decide whether the tender falls within your organisation's experience and skills. You should only bid for work you are sure you can do.

Completing your bid documents

Always remember that your bid will be evaluated only on the information you provide as part of your bid submission . None of your previous supply, dealings, communication, etc., with the buying organisation can be taken into consideration as part of your bid. As a result you must not assume that the procurement officer already knows your organisation or know about contracts you have provided before - you must provide all relevant information in your bid.

Questions and Clarifications

- Do not make assumptions. If you are unsure of anything raise a query with the procurement officer in good time i.e. per the tender timescales and the methods communicated by the procurement officer. Please note: do not include information which can identify you or your organisation e.g. company name. This is because, to ensure transparency and fairness, responses to clarifications will normally be sent to all potential bidders (those who have noted interest in the tender).

- Ensure you allow enough time in the process to be able to incorporate the buyer's response into your bid

- Once you have submitted your bid, the procurement officer may ask you to explain something in your bid (normally called a clarification). You must respond within the timelines provided by the procurement officer e.g. within 2 days

Bid Contents

- Understand the weightings for each Award criteria. The higher the criteria weighting, the more important the criteria and more time should be allocated to this
- Plan and cost the full extent of delivering the contract to ensure that you have taken full account of overheads and resource implications
- Write your responses in the format the procurement officer lists in the procurement exercise e.g.if the procurement officer asks for the response to be no longer that 2 sides of A4 in arial font size 12, ensure that you follow these instructions.
- If the procurement officer provides a pricing schedule (spreadsheet) for you to complete, use this spreadsheet and do not submit your responses in another format
- Make sure you meet all of the requirements set out by the procurement officer e.g. confirm your organisation holds accreditation, qualifications, etc.
- Try not to use general or marketing information in your bid. Tailor your response to the requirement

Systems

- Familiarise yourself with the system being used e.g. Public Contracts Scotland
- Ensure all documents provided are readable, meeting the format requirements of the procurement officer (if they have been stated) and the system being used
- Ensure you allow enough time to upload and submit all of your bid documents before the tender submission deadline. If you encounter any technical issues you should contact the PCS (or PCS-T if appropriate) Helpdesk to highlight the issues being encountered as soon as possible to avoid a late bid

Organisation

- Allow enough time to complete and respond to the procurement exercise, (including some extra time in case of issues). Do not leave working on your bid until just before the tender deadline in case of unforeseen issues: what if you encounter an unexpected delay or technical issue?

- If you are using a team for the bid, make sure they prepare, collaborate and are clear on their respective roles and the timelines involved

- Keep a checklist of actions/documents that are to be included in the bid (if one is not provided by the procurement officer) and tick these off as they are included in your bid document and/or as a separate uploaded bid attachment

- After your bid has been submitted, please ensure that you have key individuals available from your organisation to answer any questions (clarifications) the Procurement Officer may raise about your bid.

Check your Bid

- Double-check all of your responses to make sure you have not made any mistakes, missed questions or answered questions in the wrong place
- Check spelling (use a spell checker), grammar and overall appearance of your bid
- Ask someone to proof read your submission. Does your bid make sense? If you or your colleagues don't understand the bid then how will the procurement officer?

Repeat tendering

- Whether you win or lose a procurement exercise it is good to have a lessons learned session with your bid team. All learning - positive and negative – should be logged and made available for future procurement exercises
- If you have bid before, you can re-use your bid documents for another procurement exercise **but only** if they are relevant to the new exercise. All of the checking steps above still apply e.g. understand the requirements, etc.
- Proof read your bid documents to ensure they do not include any previous incorrect bid information e.g. incorrect procurement officer names
- Ensure all of your organisation's bid documents are kept up-to-date by checking them on a regular basis (it's a good idea to set standard calendar reminders for checks and reminders of document expiry e.g. for insurance certificates)
- You could set up a shared documents library in your organisation where all relevant tender documents are stored. This will make it easier to find documents for any future procurement exercises