

Overview

This standard is about determining opportunities to tender for print service contracts, to prepare tenders to meet the customer conditions and submit documents to potential clients. Products and services must be matched to the customer or client's contract, specifications and requirements.

It is important to possess the ability to undertake and complete the tendering process to gain profitable business. It is vital for learners to appreciate the impact for businesses of good tender responses and to develop the necessary skills to compete in the market place.

To allow a development of skills in the area of tender writing, this standard has been split into 3 elements:

1. Determine opportunities for tendering
2. Prepare and complete proposals for existing and new print services
3. Obtain feedback from clients

Completing the tendering documentation can be quite an onerous task. Many companies have a dedicated team to deal exclusively with the tendering process; others may just have a maximum of two individuals to deal with this. There are many skills required to be successful in winning tenders for your company. Many potential clients, especially "public sector" organisations, have "catch all" documentation, meaning that the documentation you have to complete would be the same for any product they require, it may not be specifically designed for print services.

You have to consider if your company can deliver the service required, if so some of the points you have to consider are:

1. What are the core strengths of my business and how well will these meet the needs of the buyer?
2. What do I know about my potential competition, what do they do well and can we do it better?
3. What will the client get from us that is superior?

If you, as a company decide to tender, in general there will be 3 stages that you would go through:

1. Pre-Qualification Questionnaire
2. Invitation to Tender

3. Post submission

There is the possibility that you can fail after stages 1 and 2, but you have the right to ask questions as to why as a company, you were unsuccessful and how to improve your submissions for future tenders.

Different clients have different styles of proforma and you have to adapt your presentation and wording to suit their needs. The people responsible for completing the tender documents usually work on their own but all work is double checked by senior management prior to submission.

When a learner is discussing feedback with a client, have prepared questions ready and do not enter into a “blame confrontational situation”. If successful, ask them what was it that made you (amongst) their preferred choice(s).

Performance criteria

Determine opportunities for tendering

- You must be able to:
- P1 identify an opportunity to tender using appropriate networks
 - P2 obtain details of the tender
 - P3 research similar bids or tenders
 - P4 define and confirm client needs

Prepare and complete proposals for existing and new print services

- You must be able to:
- P5 use accurate information to complete proposals
 - P6 complete all sections of the proposals
 - P7 use plain English and good grammar
 - P8 where possible, demonstrate track record in categories applied for
 - P9 where possible, seek approval to use appropriate references from previous clients
 - P10 demonstrate your pricing policy offers “best value”
 - P11 include all additional information that will add value to your bid
 - P12 submit tender bid timeously

Obtain feedback from clients

- You must be able to:
- P13 obtain feedback from client
 - P14 analyse feedback
 - P15 address weaknesses

Knowledge and understanding

You need to know and understand:

- K1 how and where to research tender opportunities
- K2 where to get further information about a tender
- K3 understand client needs
- K4 tender requirements and procedures
- K5 how to complete all sections of documentation using appropriate language
- K6 how to prepare costs, mark ups/margins
- K7 how to compile cost spreadsheets
- K8 who to consult regarding resources for now and in the future
- K9 ask appropriate questions for feedback
- K10 how to evaluate the feedback
- K11 contract law

PROPA07 SQA Unit Code (H7TM 04)

Tender writing: identify opportunities, complete and submit tender documents



Additional information

Scope / range:

Learners will be expected to work on their own, although they will often liaise with other colleagues such as production staff and senior managers.

Good product manufacturing knowledge is essential, allied to the need of good communication and customer service awareness.

The standard also expects you to reflect critically of your own work, before and after submission as means of constant improvement.

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Tender writing: identify opportunities, complete and submit tender documents



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