

## Fit to Tender Checklist

Whether you are tendering for public sector contracts (eg council, central government, utilities etc) or for work with a major corporate, the higher the contract value the more rigorous the whole tendering process becomes.

Before getting on to the tender list you may have to go through a qualifying process by answering a pre-qualification questionnaire (PQQ). This in its own right can be very time-consuming but if you cannot qualify, you won't get to tender.

Here are two checklists with of some of the key items you'll need to answer in full:

### **PQQ & Tender Information Checklist**

Within your business is there sufficient understanding and capability to give credible answers to the following in any Expression of Interest, PQQ, Proposal or Tender?

- Administrative information
- Business probity
- Economic and financial standing
- Health and safety
- Quality assurance
- Technical capability (eg operations, specifications, manufacturing process)
- Customer care & service levels
- Equal opportunities
- Environment
- References

**If you need any help or support with any aspect of Tendering contact**

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## **PQQ & Tender Documents Checklist**

Is there is in place the following documentation that can be evidenced in any Expression of Interest, PQQ, Proposal or Tender?

- Certificate of Incorporation
- Organisation / company / group structure chart
- Audited accounts for the last 3 years (sometimes 2 years is enough)
- Employer's liability insurance certificate
- Public liability insurance certificate
- Health and safety policy
- Quality assurance policy
- Equal opportunities policy
- Environmental policy
- Documents supporting technical capability

## **Other Points to Consider – Is this Tender Right for my Company?**

The tendering process is used to help buyers choose the right supplier(s) at the best value for money and to help them minimise risk. Not only do you need to ensure that everything mentioned above is in place but you also need be confident that you can win the tender.

### **Is my company big enough?**

- As a guide buyers will be checking that the tender contract value does not exceed 20-30% of the tendering company's turnover (NB this is a guide, not a rule)
- This is because the buyer wants to be sure the contract value will not be too much for the company to handle
- The size of your company dictates the maximum size of contract it is likely to win

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## Can my company meet the buyer's needs?

- You may look at a contract and think that your company can do most of the work but if there are areas that it cannot manage, your chances of qualifying or winning can be seriously reduced
- This may be in terms of specification, geographical location/coverage, mandatory accreditations etc

## Can I show relevant experience?

- Buyers like to see that suppliers can prove they can do the job, therefore references from similar organisations for similar work are ideal
- If you haven't got these, you will need to show you have 'transferable skills' from customers with similar needs
- If the work you are bidding for is not a 'core competence' (ie it represents only a small element of your company's overall turnover) it can reduce your chances of success

## Has my company got sufficient trading history?

- As shown in the above Tender Documents Checklist, public sector buyers generally ask for audited accounts for the last 3 years (sometimes 2 years is enough)
- This means that Start-Ups are not always in the best position to win bids

## Has my company got sufficient resources, time & tendering expertise?

- Tendering is time consuming – you will need to invest a lot of your time and resources to create a winning bid
- Tendering can also be a daunting task – especially if you do not have the right skills or expertise.

## What can I do?

- Wait for the tender opportunity that is right for your company – it is a waste of time tendering for contracts that you are not going to win!
- Continue to grow your company until it is better positioned to tender
- Collaborate with another business that can complement your company and help minimise any of the 'gaps' mentioned above
- Use consultants or other resources to help you through the tendering process

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