
Overview

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.

It is relevant to bid professional and bid advisors.

**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

Additional information

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
- CFASLS51 Develop sales proposals and quotations

Developed by	Skills CFA
Version number	1
Date approved	December 2013
Indicative review date	December 2016
Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAT003
Relevant occupations	Chief executives and senior officials; Purchasing managers and directors; Buyers and procurement officers; Sales accounts and business development managers
Suite	Bidding & Tendering (2013)
Key words	Bidding; tendering; proposals; plan the bid; assessment/scoring criteria; bid team; bid manager; capture planning
