

Overview

This standard is about preparing to bid. It focuses on all activities involved prior to making a 'bid no bid' decision. It is relevant to in-house bid managers, other related professionals, technical specialists, marketing, sales and business development teams and business owners.

Performance criteria

You must be able to:

1. plan all relevant activities to influence the buyer or funder to increase your organisation's probability of bidding success
2. select the opportunities to bid in line with your organisation's business strategy
3. agree on the types of information gathered from research and the approach to be taken in analysing it
4. collate the resources for analysis and agree on timescales for completion
5. obtain all relevant information about the bid to appraise pre-bid understanding and the bid opportunity capture strategy
6. collect and analyse the relevant information on the opportunity, including the buyer's/funder's policies, the market, key stakeholders, competitors, and the offer type to improve your organisation's competitive advantage
7. obtain all relevant bidding documents and seek any necessary clarification from the customer
8. identify and prioritise the resources and expertise required to fulfil the bidding request
9. assess all risks associated with the bid type
10. present the 'bid no bid' proposal to senior managers / directors
11. consult with the internal and external stakeholders on 'bid no bid' decision and seek guidance from appropriate experts where required
12. make recommendations on the 'bid no bid' decision based on associated costs and benefits of bidding
13. approve the bid action plan and timings for completion with decision makers

Knowledge and understanding

You need to know and understand:

1. the relevant legal, regulatory and ethical requirements that relate to bidding
2. the current best practice(s) relevant to bidding
3. the principles of the bid opportunity capture strategy
4. the methods of obtaining the relevant types of information
5. the key marketing techniques and ethics involved in influencing business activities
6. the sources of relevant information, methods of collecting it and analysing different types of data
7. how to choose the appropriate approaches to information research
8. the different approaches to resourcing bids and the circumstances applicable
9. how to carry out a risk assessment
10. the organisational procedures for checking the relevant contractual terms
11. the sources of available expertise
12. how to produce 'bid no bid' recommendations, based on evidence and analysis of strategic and contextual factors

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: (sales or win strategy) is a plan to win a specific opportunity. (Source: APMP – Glossary of terms)

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