

TENDERING CHECKLIST

From Preparation through to Completion and Submission

Please note this is a procurement and commercial checklist and is not meant to be legal advice. If unsure, please seek legal advice before entering any contract.



Ready to Tender

Tendering Review Checklist

What to watch out for from
tender preparation through
to tender submission?





Getting Ready to Tender: Planning = Preparedness

Detail	What to Consider	Yes/ No	Comments
Do you have a capability statement or organisational profile?	Your capability statement/ organisational profile is a statement that includes your organizational details/ history and reflects your business' competencies, achievements, partnerships, alliances and accreditations. The capability statement/ organisational profile is the vehicle to communicate your business' capability to potential business partners, customers, suppliers and other stakeholders.		
Do you understand what capacity you have for more work?	It is good to know whether you have room to take on more work and if you have the right number of people and capability to be able to tender for more work. You need to be able to resource the tender requirements when successful. Furthermore consider the impact on your cashflow when taking on a new client.		
Have you registered on the relevant tender sites to make sure that you know do receive notice of upcoming tenders?	There are several tender notification websites and it is good to find the right ones to register your business' interest and area of business.		
Once you receive your copy of a tender, have you registered your interest in order to make sure you are informed of any changes?	When you receive a tender that is of interest, it is important to make sure that you register in order to get any updates or changes. Where you download a tender electronically, you will usually get notification of any updates or addenda added to the tender.		
Do you understand all of the requirements and can you comply to all of the requirements?	What is important in the tender? Are there any gaps in what you can or cannot do?		
Are there any areas you do not	If you do not understand something, talk to the tender contact person or ask the question on the tender forum where this is the		



Detail	What to Consider	Yes/ No	Comments
understand?	designated manner for asking questions. Be mindful how you phrase your questions as answers will be shared with all interested tendering parties. Also only speak to the person designated in the tender as the tender contact person.		
When does the tender have to be submitted?	What is the closing date and time? Late tenders in most instances will not be accepted. It is prudent to aim for submission 1 day earlier, that way you do have extra time in case putting the tender together takes longer than planned.		
Is there a tender briefing session? Is the tender briefing session mandatory?	It is always useful to attend tender briefing sessions and/or site visits. Where tender briefings are mandatory, you have to attend otherwise you will not be able to participate in the tender.		
Do you understand the scope of work?	Is the scope within the scope of what you company can provide? What is in scope? What is out of scope?		
Do you understand the pricing criteria?	What are the pricing criteria – are you expected to tender on a lump sum basis/ fixed or variable basis? What is included in the pricing? What is excluded in the pricing? Do you have enough information to complete the pricing for the tender?		
Are you able to complete the total scope in-house?	Can you complete the contract without needing to use sub-contractors or partners? If not, make sure you allow enough time to get information from the related parties and to agree who does what.		



Detail	What to Consider	Yes/ No	Comments
	If you are in a consortium and the consortium has not been invited to tender, you will have to make sure that you get approval to tender as a consortium.		
Do you understand the tender evaluation criteria and how to comply with it?	Determine the criteria against which your tender will be evaluated and note any weighting placed on each of the criteria. These are important to pay attention to as the tender evaluation is done on the criteria.		
Is this a high value tender that will need its own strategy and planning and outlay of capital/ cashflow?	For high value tenders you may wish to determine at an early stage if you can provide a competitive solution.		
Do you understand the contract terms and conditions?	Read the contract terms and conditions and make sure you can comply. If need be, source external advice. Make sure you note any deviations and reasons for why you are requesting a change in terms.		
What is the tender submission format?	Is it electronic or hard copy delivery? How many copies? Paper or electronic? Allow time to make print, copy and bind if hard copies are required. Also make sure you do not need to comply with any special signature requirements (e.g. justice of the peace witnessing)		
What tender forms need to be completed?	Are there any mandatory tender forms to be completed? These need to be completed otherwise your tender may not be included in the evaluation process.		



Preparing and Completing Your Tender

Detail	What to Consider	Yes/ No	Comments
Are you answering what has been asked of you?	<p>Quality still beats quantity.</p> <p>Make sure that you answer what is asked in the sequence it is being asked. Cover what is required but do not over-provide information if there is not substance to what you are able to do.</p> <p>Your tenders must reflect your capability and capacity to complete the contract.</p> <p>Furthermore pay attention to the weighting applied to criteria as this will determine where and how you spend your time responding to the information requested.</p>		
Do you need to complete any tender schedules?	<p>If tenderers response schedules have been provided, use them.</p> <p>Do not create your own templates e.g. to provide company information requested unless the tender allows you to do so.</p>		
Are there any formatting or number requirements?	<p>Even where no formatting requirements are provided, it is professional to follow the same sequence as the tender documents.</p>		
Have you answered all of the sections?	<p>Make a checklist from the tender documentation and tickoff all of the requirements as you go. A checklist is also handy to use a planning tool to make sure you have enough time to be able to complete the tender and submit in time.</p>		
Have you provided all documentation and	<p>Make sure you provide all of the documentation and schedules as required. Again useful to add to you</p>		



Detail	What to Consider	Yes/ No	Comments
schedules as requested?	checklist above to ensure it gets done.		
Are there any industry standards or specifications required?	Are any supporting documents required? Are they attached? Think of areas such as health, safety and environment, people training and competencies, quality assurance etc.?		
Have you shown in your response how you will meet the evaluation criteria?	Completing the evaluation criteria must be factual and actual and not just motherhood statements. Remember the criteria will determine your success. Look at the weighting for each of the criteria as this will determine where you should spend your time responding.		
Have you completed the price or cost schedule for all items you are tendering?	Have you completed the costing/pricing information as requested? It is always a good idea to make sure that you clearly outline any pricing assumptions.		
Are you competitive?	How do you know you are competitive? Have you done your market research?		
Have you confirmed with your referees that they are willing to be a referee?	Carefully select referees. Also make sure that they are appropriate to the tender.		
Have there been any amendments?	Have you addressed any tender amendments? Do you need to sign and return any addenda to acknowledge receipt? Remember to include any addenda signed off in your tender submission.		
Is this an alternative/non-conforming tender?	If you do not submit a conforming tender together with an alternative/non-conforming tender, your tender may not be accepted in the first place. It is necessary to check with the tender contact person if non-conforming tenders will be accepted.		



Finalising and Submitting Your Tender

Detail	What to Consider	Yes/ No	Comments
All forms been signed as required?	<p>The devil lies in the detail.</p> <p>Remember to meet any special signature/completion requirements (e.g. justice of the peace witnessing).</p> <p>Also remember to include any addenda signed and returned with your tender submission.</p>		
Do you need a cover letter?	<p>A cover letter can make a good impression but is not always necessary. It will depend on the tender and the practices in your industry.</p>		
Have you followed the requirements for formatting and filing of documents?	<p>Do you need to submit documents in a particular format?</p> <p>Do you need to have an index?</p> <p>Do you need to number pages sequentially?</p> <p>Do you need to upload qualitative/compliance forms in a different tender box to pricing?</p>		
Tender reference – are you meeting the stated requirements?	<p>Make sure that the tender submission documentation, including envelopes, letters etc. have the tender reference, contact details etc. as set out in the tender documentation.</p> <p>Consider using number (01, 02, 03 etc.) in front of the tender reference to manage the order in which documents will appear in zip folders. Make it easy for the tendering organisation to find documents in a logical manner.</p>		
Tender submission	<p>Is the tender upload electronic?</p> <p>Should the tender be faxed or emailed?</p> <p>What about hard copies?</p>		
Do you have evidence of successful submission?	<p>Always take a screen shot of the confirmation of successful upload</p> <p>If you do a hard copy delivery, get the reception to stamp a copy of your cover letter.</p>		



Notes

Reminders / To-Do-List



About Ichiban Commercial Solutions:

Ichiban Commercial Solutions deliver a broad range of commercial solutions for our clients, focused on their value proposition and business growth.

The general areas of support include commercial business advisory, procurement and tendering support. However, given our diverse skill set and business experience, we often support our clients across other areas of business

Celia Jordaan, Principal Commercial Consultant founded Ichiban Commercial Solutions in 2015. Celia Jordaan has over 30 years international and corporate experience and worked in the areas of commerce, contract negotiations, complex procurement, tenders, supply chain, contract management, law and risk.

She has managed procurement/supply chain teams and has worked on both sides of the spectrum, both from a company and a contractor/supplier perspective. Her experience and background include working in the mining and resources sector and assisting construction companies, not-for-profits, small and medium business and government project sector clients.

For more information, visit: <https://ichibancommercialsolutions.com.au/>

Please note:

The views and opinions expressed in this presentation and workshop are those of the author specifically and do not necessarily represent any official policy or position. This document remains the intellectual property of Celia Jordaan and Ichiban Commercial Solutions Pty Ltd and may not be copied, distributed, shared, printed or used without prior written approval.

© 2024 Ichiban Commercial Solutions Pty Ltd

