



*Training Course:
Advanced Tendering Management, Specifications
& Evaluation*

*23 - 27 September 2024
Manchester (UK)*

Training Course: Advanced Tendering Management, Specifications & Evaluation

Training Course code: PC234829 From: 23 - 27 September 2024 Venue: Manchester (UK) - Training Course Fees: 5250 € Euro

Introduction

Advanced Tendering Management, Specifications & Evaluation training program covers each step of the tendering processes and procedures as well as the different techniques and approaches used in managing tenders.

Participants in this interactive course will learn the tools and techniques used in analyzing submitted bids including preliminary examination, technical evaluation, and commercial evaluation, and the best practices to manage the tender.

This training program will empower you with accurate information at the different stages of the tendering process such as inviting bids, selecting criteria & weightings, evaluating tenders, shortlisting, awarding the successful tender, debriefing, auditing, transparency, and probity.

Training Program Objectives

By the end of the Advanced Tendering Management, Specifications & Evaluation training program, participants will be able to:

- To formulate criteria constituting the formation of a contract
- Learn the making of an Effective tender and bid Management
- Be informed of the legal status of the invitation to tender
- Be aware of legal issues in the tender process
- The process of contracting and documentation
- Know the legal obligations of owner and bidders
- Obtain an understanding of drafting specifications in Bid Preparation
- Ethical conduct in the Bidding process
- Acquire the principles of evaluation of tenders
- Sharing the best practices on Tender and Bid Management
- List the contracting stages from setting the scope of work to awarding the contract
- Outline the main objectives for the tendering process and recognize other alternative contracting methods
- Prepare the tendering strategy, determine the sourcing method and scope of work of the project, and plan the evaluation process of the bidders
- Evaluate in-depth the process of preparing tenders and selecting potential contractors
- Identify preliminary, technical, and commercial evaluation procedures and apply several methodologies using criteria, weights, and scoring protocols to optimize the bidder's selection process

Target Audience

- Procurement and Supply Chain Managers
- Tendering committee
- Chief Procurement Officers
- Procurement Team Leaders
- Cross-functional team members

- Commercial Specialists
- Contract Managers
- Sourcing Manager

Training Methodology

Global Horizon Training Center develops and designs courses to cater to a broad audience. Before each training session, the course is meticulously reviewed to check for relevance to the audience. Training is delivered by a highly experienced professional in the related domain, using audio-visual presentations.

Participants' involvement is encouraged through group assignments and projects. Role plays and relevant case study discussions boost the relevance of the topic. Experiential learning is encouraged as well.

Organizational Benefits

Professionals attending this course, and organizations will derive the following benefits:

- Know how to manage tender and bid
- Be mindful of legal issues in the tender process
- Acquire the principles of evaluation of tenders
- Understand and know the process of contracting and documentation
- Determine real needs, document requirements, and write specifications
- Develop their communication, stakeholder management, and negotiation skills

Personal Benefits

Participants enrolling in this course will benefit as follows:

- Gain an understanding of drafting specifications in Request for Tender RFT
- Be informed of the legal status of the invitation to tender
- Understand the rules, regulations, and guidelines to follow in bidding and tendering
- Look at the Bid and Tender process from both a buyer and a supplier perspective
- Identify potential suppliers and potential customers
- Learn the essentials of making a contract

Training Program Content

Tender Specification

- Understanding Business needs
- Cross functions inputs to specification
- Stakeholder inputs to be considered in the specification
- EBI & ESI
- Types of Specification:
- Conformance Specifications
- The technical specification for product and service
- Performance Specification
- Pro and Cons of Conformance and Performance Specification
- Use of Standards in Specification

Developing Sustainable Specifications

- Incorporating - HSE considerations when developing the specification
- Context of Right Specification to meet the business needs
- Consequences of wrong/inadequate specification
- Developing KPIs and SLAs
- Use of Benchmarking to develop effective specifications

Pre-Tender Assessments

- The rationale for Tendering Process
- Anti-competitive agreement Competition laws
- Collusive Tendering and Bid-Rigging
- Transparency & Corruption
- The Scope of the Contract Scoping
- Type & Quality of Goods and Services required
- Mode of Delivery of Services
- Consultancy contracts
- Factors affecting the contract
- Cost, complexity
- Project drivers
- Time constraints

Tender

- Strategies governing Tender
- Tendering governance in Procurement Policy and Procedures
- Type of Tenders
- Tender Working Group
- Cross-functional input to Tender
- Preparation of Tender Documents
- Invitation to Bids - ITT/ IFB
- Preparation of Pre-qualification process
- Developing the RACI Matrix

Tender Committee

- Presents the Goal of Evaluation and Selection Methods
- Provides A List of Policies and Related Legislation
- Stresses the Departmental Guiding Principles and Best Procurement Practices
- Defines the Role and Responsibilities of Personnel Involved Within the Evaluation and Contractor Methodology Process Identifying the Requirements to Prepare the Bid Solicitation Document
- Discusses the Structure and Content of The SOW Provided by The Client
- Explores the Importance of The Requirement Definitions
- Exploring the Timeline before

Detailed List of Elements of a Bid Solicitation Document

- Define Players and Responsibilities of The Bid Evaluation Team
- Technical criterion
- Commercial criterion
- Joint Evaluation Matrix
- Key Principles in the Evaluation of Tenders
- How to Evaluate Non-Price Criteria

- Clarifying Tender Submissions that may be unclear
- The weighting of Criteria and Scoring
- Pre-Tender negotiation
- Post Tender negotiation
- LOI / Contract Finalization
- Process of De-briefing

Evaluating the Bid Responses

- Explores in Depth the Evaluation Process
- Presents Examples of Bid Scoring Grids and The Evaluation Summary Report
- Introduces Negotiation Procedures
- Discusses the Options of Bypassing, Cancelling, Reissuing, and Extending Bids
- Lists the Considerations Prior To Awarding A Contract and Most Common Complaints
- Provides an Introduction and Lessons Learned from Past Bid Challenges
- Review of Bids and Recommend the Awards

Cost Plus Evaluation and Principles on Contract & Negotiations

- Cost Plus Factors
- Fixed Price Mechanism
- Negotiation in Price and Contract Terms
- Introduction to Contract
- Indemnities & Liabilities
- Contract Management

Risk Management in Tender Bidding Process

- Binding Process Contract
- Non-binding relationship
- Flexibility within the Tender Guidelines / Specifications
- Documentation
- Diligence in Drafting Tender Documents
- Fair & Equal Treatment to all Bidders in Tender Process
- Training to highlight Risks
- Misrepresentations to Bidders and Tenderers
- Reducing the risk being non-compliant bids

Sharing Best Practices in Bidding

- How to Win Bids? What 7 things client wants
- Bid or No Bid?
- What is the strongest strategic tool?
- Guidelines for Bidding
- Points to look out for in Tender Documents
- Managing Bid & Bidding team
- 6 Key features of bid summary
- Sharing Ethical Moral principles
- Choosing Evaluation and Award Criteria
- Communicating the Results - Internally and Externally

- Operating under Pre-contract Letters of Intent
- Managing Pre-contract Scope Changes
- Initiating Contract

Registration form on the Training Course: Advanced Tendering Management, Specifications & Evaluation

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Complete & Mail or fax to Global Horizon Training Center (GHTC) at the address given below

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Payment Method

- ☐ Please find enclosed a cheque made payable to Global Horizon
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