

Tender Tip – Tender Briefings

Sizeable Request for Tender (RFT) processes will often involve a briefing to tenderers and maybe even a visit to inspect a proposed service site. The idea is that these events help tenderers better understand the requirement and allow the buyer to emphasise those things that are important. In turn, this leads to improved tenders and therefore better contracts. Great idea, right? Well maybe, maybe not. This tender tip explores the tender briefing phenomenon and asks: **“Tender Briefings – Valuable or Valueless?”**

	Valuable – the Case	Valueless – the Case
Purpose	Reading an RFT / Scope of Work over and over is one thing, but nothing improves understanding more than seeing things first hand and talking directly to the people who will be the customers of the work. Besides, it is an efficient method to communicate intent.	Tender briefings are a tick-the-box compliance activity that adds no value because the presentations mostly don't share anything more than what was stated in the RFT anyway. Also site visits, if done at all, are often so tightly controlled that nothing interesting is revealed.
Content	Briefings give buyers a better chance to demonstrate and reinforce what is truly important to them. In essence, the buyer has a chance to sell the opportunity. Tenderers will decide if they want to bid based, in part, on how well this is done.	Tenderers never say anything meaningful during tender briefings for fear of giving something away. Besides, the briefing process and/or site visit is usually so rushed anyway that in-depth examination of issues/concerns by either the buyer or the bidders is not possible.
Probity	All tenderers get equal access to the briefing and opportunity to inform themselves. This can minimise the risk of claims by bidders of impropriety or bias in the tender process, especially if individual approaches are not permitted.	The tender process probity and compliance burden increases by holding a briefing or site visit as it is sometimes hard to ensure multiple attendees receive exactly the same information and speak to the same people about the same things. The process can therefore introduce bias.
Competition	Companies bidding for work pretty much know their competitors already so getting them together in one place for a briefing does no harm. If they don't, then briefings help provide a sense of competition (even if attendance lists are not disclosed) and bidders can better prepare their bids by knowing the competition.	Creating a process that knowingly allows competitors to identify each other may cause some tenderers to not bid. Alternatively, if they do bid, sellers may be more focussed on building a “winning” case against the competitors rather than focusing on the best outcome or solution for the customer.
Questions	If someone asks a good question, it is an opportunity to explore the views of all people simultaneously. By doing this, a better outcome for all (buyers and sellers) can be achieved.	Tenderers ask very little for fear of sounding silly or unknowledgeable. But if a tenderer does ask a good question, then all competitors benefit from the response. What's the incentive for a bidder to do that?
Personnel	Wise buyers appreciate the opportunity to meet potential contractors and to pick up some non-verbal cues that they might otherwise not get. Wise bidders also appreciate any opportunity to personally meet potential customers and reinforce their own company's benefits.	Briefings and site visits are just an outing for senior managers and business development people. The people that really should go rarely get to attend because there is a limit on the number of people from each bidder. Even with no limit on attendee numbers, bidders often send the wrong people anyway.

Tender Briefings – Valuable or Valueless: The Verdict...

Like most things in life, your view on tender briefings will depend on particular circumstances and perspectives. Listed below are some thoughts and tips for both buyers (especially procurement staff that usually organise the briefings) and bidders/sellers to get the most out of tender briefings. And by sharing ideas from “both sides”, everyone can benefit.

Thoughts and Tips for Buyers:

- **Purpose:** What is the point of the briefing session? What are the key messages you want bidders to leave with? Why can't you do this in writing? Make sure you have thought about the benefits of conducting a briefing before adding the extra tendering time and effort.
- **Scope:** Are you using the briefing process to paper over a poorly defined requirement? If you are, then perhaps you should direct efforts toward improving the written scope.
- **Resources:** Have you allowed sufficient resources to properly prepare for and manage the briefing and/or site visit? There can be significant organisational issues if multiple tenderers and remote localities are involved.
- **Timing:** If a briefing is being planned, then how far into the tender open period do you hold it? Being too early or late can be problematic.
- **Questions:** Have you anticipated the sorts of questions that tenderers will ask? And how are you going to provide answers? (Hint: taking every question on notice does reinforce the “valueless” argument!)
- **Individual Meetings:** Are you prepared for meetings with individual tenderers (if they ask) or are you mandating one session where everyone turns up?
- **Fairness:** If you are not going to make attendance mandatory, how will you ensure valid comparisons between tenders submitted by those that did attend vs those that did not?
- **Attendance List:** Do you want to disclose the attendance list to all participants or let the tenderers try and figure out who is attending?
- **Follow-up:** Make sure that anything said, produced or committed to in connection with a tender briefing is properly documented and incorporated into the overall tender process.

Thoughts and Tips for Bidders/Sellers:

- **Attendees:** Really think through who you send along to the briefing session. Why do you want them there? What are they going to do/say at the briefing? Are they the best people to enhance your bid response efforts?
- **RFT:** Read and understand as much of the RFT as you can before the briefing. As well as getting the most value from the briefing, it also means you can resolve any inconsistencies on the spot.
- **Visibility:** How visible a presence do you want? Do you sit at the front and ask lots of questions? Or do you sidle in unnoticed into the back row and make sure you only sign the attendance sheet just before escaping?
- **Competition:** Try to work out your competitors through the attendance lists, networking or directly asking the buyers at the briefing.
- **Presenters:** People presenting at the tender briefing are likely to be evaluating the tender. Do you know them? Can you work out what they, as individuals, hold most important?
- **Insight:** Consider what isn't being said or presented as much as what is. You should get valuable insight about what the key issues are and the things that may not be as important.
- **Questions:** Ask strategic and insightful questions, not minor detail which can be answered outside the briefing through the clarification process.
- **Opportunity:** Is there anything that could benefit you or the bid by being raised in a group setting? For example, are there any particular concerns with the pricing schedule where you may actually get support from other bidders?
- **Pricing:** Use this opportunity to find out whether pricing will really dominate decision-making or whether overall value is the key requirement.