

To tender or not to tender: assess your next opportunity

Evaluate your next tender opportunity and assess your strengths and weaknesses using our checklist. This checklist is informed by 20 years of working with clients and analysing their wins and losses. The likelihood of a client's success has consistently correlated with a positive response to most of these statements.

How to complete the checklist

Simply tick **YES** if you genuinely agree with a statement, or **NO** if you don't. It's important to be as honest as possible when completing the checklist.

Strategy

YES NO

1. We have a clear and thorough understanding of all tender requirements and specifications.*
2. This opportunity aligns with our core business.
3. This opportunity will help us meet one or more of our strategic objectives.
4. This is a financially viable project for our company.*
5. We have buy in from key stakeholders across the business.*
6. We know the vendor, and have a thorough understanding of their needs and pain points.

Ability to deliver

YES NO

7. We can deliver to these specifications without having to tweak our current service model.
8. We have the right people with the right skills for this work, or if not, we have the desire and budget to recruit the right people.
9. We have the capacity to take on this work.*

Track record

YES NO

10. We are incumbent service providers, and have a good track record with this vendor.
11. We have a good track in delivering similar types of projects and services to other vendors.

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Risks

YES NO

12. There are no known financial risks associated with this project.
13. We've analysed the opportunity, and know the revenue/profit to be gained during the proposed term of the contract, as well as any investments required/costs to the business.*

Commitment to tender

YES NO

14. We have the time and capacity to prepare and submit a thorough response within the timeframes specified.*
15. We are familiar with all stages of the tender process (e.g. a Pre-qualification Questionnaire, a Request for Tender, and/or a presentation) and will ensure time and resources are allocated throughout the entire process.
16. We have resources available to start working on the tender immediately.
17. Key experts in our organisation have committed to providing their input and experience as required.
18. We understand the costs associated with preparing this tender, and agree that working on this tender is time well-spent.

* indicates crucial to success

How to assess the results

If you ticked **YES** against 15 or more of these statements, including all those marked with an asterisk, you have well-positioned to win this tender.

If you ticked **YES** against 10-15 of these statements, including all those marked with an asterisk, use this checklist to identify and address any potential risks and weaknesses. Understand that you may need to invest more time and resources into improving your chances of success if you choose to tender. Alternatively, you may decide this is not the right time and/or the right opportunity for you at present.

If you ticked **YES** against less than 10 of these statements, and **NO** against any of those marked with an asterisk, we recommend you reconsider your intention to tender for this opportunity, as you are not well-placed to win this work.

Need help? If you have any questions, call Proof Communications for an obligation-free discussion on **02 8036 5532** or **0411 123 216**.



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