

# TENDERING AND PROCUREMENT

## Winning Tenders: Preparing, Writing and Submitting Superior Tender Proposals

6 & 7 July 2011, Auckland

## Service Level Agreements

4 & 5 August 2011, Auckland

## Tender Preparation and Evaluation Techniques

24 & 25 August 2011, Auckland

**SEPARATELY BOOKABLE SEMINARS**

### Facilitator:

Bernie  
Diver



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# Winning Tenders: Preparing, Writing and Submitting Superior Tender Proposals



**Auckland**  
6 & 7 July 2011  
Mercure Hotel

**Facilitator:**  
**Bernie Diver**

## Understanding the procurement perspective

Many buyer organisations are now behaving differently from the purchasing office we once knew, and now use 'procurement' language. This session will explore the approach the procurement office takes before getting to tenders and RFPs, and help you understand the buyers view of your business.

## Understanding the request for proposal (RFP) or tendering process

- Quotations
- RFPs
- Expressions of interest (EOI)
- Requests for information (RFI)
- RFI conferences and/or briefings
- The RFP closure process

## Selecting the most appropriate tender for proposal

- Understanding your organisation's offering
- Identifying, understanding and developing your competitive advantage points
- Scanning the market for tenders/RFPs
- Analysing which tender/RFP is most closely aligned with your organisations skills & resources

## Reading & understanding the tender/RFP document

- Reading the tender/RFP - what's important and what's not
- Understanding exactly what the client is looking for
- Defining the business issues involved and how your organisation can resolve them
- Matching the client's needs with your organisation's strengths

## Keep your friends close, and your enemies closer - the importance of acutely understanding your competition

- Identifying the competition
- Understanding your competitors strengths and identifying their weaknesses
- Developing a strategy to compete head-on in your proposal - differentiating yourself from the flock

## Success lies in preparation - preparing for the tender/RFP proposal:

- Understanding your unique selling points and the aspects of your product/service that will win the tender
- Researching the client, their company and their history
- Asking for more information - the do's & don'ts
- Other factors to consider in preparation for the proposal - costing, timeframes & selecting key personnel

## The final touch - writing a superior proposal

- Structure & format
- Providing the appropriate level of information

- The executive summary
- The cover letter
- Key recommendations and pricing
- Presentation and language

## Submitting the proposal

- The importance of punctuality
- Creating a positive first impression
- Presenting your proposal - selling your solution to the client
- What not to do - the top reasons why proposals often fail

## It ain't over yet - Negotiating a win-win contract

- Improving your negotiation skills
- Effective listening & questioning skills
- Techniques for handling the 'tough customers'
- Reaching agreement and gaining commitment in the negotiation process - working towards the win-win
- Continuing the relationship in the long term

## Probity Issues

- Asking questions of the buyer organisation
- Communications with the buyer organisation
- The debrief

## Bernie Diver

### Managing Director, Strategic Sourcing



The Strategic Sourcing Consultancy was created by Bernie Diver in 2005. Prior to establishing this business Bernie operated as an independent consultant working through a number of established consultancy firms. Through the establishment of Strategic Sourcing, Bernie has committed to ensuring sustainability for both clients and suppliers through the implementation of the right strategies to deliver the best total cost of ownership possible.

Bernie has advised many leading companies in the negotiation of major strategic sourcing transactions. Some of the clients advised include Air NZ, RNZAF, Carter Holt Harvey, Fletchers, The Rank Group, Goodman Fielder, and the Wellington City Council. Bernie has been involved in international negotiations with GE, Air France Industries, Boeing, Rockwell Collins, and PMP Pty Limited.

Bernie's focus is to assist companies to approach their negotiations using structure and strategic thinking. Studying negotiation at Harvard Business School has enabled Bernie to combine his experience and passion for negotiation with the very best of practical frameworks to create value for clients.

# Service Level Agreements



**Auckland**  
4 & 5 August 2011  
Mercure Hotel

**Facilitator:**  
**Bernie Diver**

## An introduction to Service Level Agreements

- Understanding the differentiation between SLAs and other terms and conditions
- Purpose of SLAs considered from different perspectives - purchaser, provider, in-house providers
- The growth of partnering arrangements versus traditional penalties based agreements
- Common problems associated with SLAs
- Why are SLAs fashionable?

## When to use Service Level Agreements

- Identifying whether to apply an SLA solution
- The cost-benefit determination on whether to introduce an SLA
- An introduction to the total cost of ownership principles
- The relationship between objectives, measures, targets, and incentives & disincentives
- The debate on the use of penalties, liquidated damages, or retaining a right to sue for general damages in SLAs
- Carrot or stick approach - determining the correct tone of relationship to encourage performance

## How to choose the most appropriate measures

- The use of "smart" measures
- What can be learnt from a balanced scorecard approach?

## Process mapping

- The steps involved in process mapping
- The additional benefits that accrue
- An exercise of process mapping on processes relevant to the course participants

## Planning for SLAs

This session walks course participants through each of the steps necessary to develop an effective SLA with each of the participants using an example relevant to their business. The session culminates in the course participants applying the knowledge gained to date in developing and discussing the key components to their own developed SLAs.

## Effective service level management and contractor management

- Ensuring an effective working relationship
- The importance of designated key people at client and provider ends who are committed to ensuring effective, open communication and who have the end result in mind

## SLA reviews

- Understanding the difference between reviews of SLA targets and reviews of SLAs
- Scheduling and conducting reviews of your SLAs and the performance of service provider
- Common performance issues and how to deal with them
- Benchmarking performance
- Understanding how SLAs can go bad and fail to deliver as per expectations

## When good contracts go bad - Terminating SLAs

- Understanding your rights to terminate an SLA
- Applying the contractual processes for termination

## The contract

- Documenting effective SLAs
- Key issues to consider when negotiating & documenting the SLA
- Typical SLA documentation

## Negotiation skills

- Understanding how to manage the power that exists in a relationship and around the negotiating table is crucial to getting the best outcome.
- This relaxed session focuses on how to increase your power and how to use and combat negotiation tactics that are frequently used

### CUSTOMISED IN-HOUSE TRAINING

If you have a number of staff in your organisation who require training, Conferenz offers customised in-house training solutions.

Contact us now to discuss how you can **SAVE UP TO 40%** on public training costs. Call Michael Earley on (09) 912 3610 or email [mike@conferenz.co.nz](mailto:mike@conferenz.co.nz)

# Tender Preparation and Evaluation Techniques



## Auckland

24 & 25 August 2011

Mercure Hotel

**Facilitator:**  
**Bernie Diver**

## Introduction to procurement

- The big picture of Procurement
- Total Cost of Ownership (TCO)
- Best Practice

## Developing your sourcing strategy

- Examining the tender/RFP process as a concept and its significance and place in the procurement and project management process
- Defining your objectives, scope and boundaries
- Examining the relationship framework
- Can this process itself be outsourced?
- How to prepare budgets and identify purchasing authorities
- Planning and staffing requirements for procurement projects
- How to reduce effort, time and costs
- Analysis of the reasons why tenders/ RFP's fail

## Understanding the professional tender/RFP process

- Exploring the various stages of the purchasing process:
- Quotations
- RFP's
- Expressions of interest
- Requests for information
- How to use the RFI conference and/or briefings
- RFP closure process
- How to assign the right staff and professionals
- Techniques for goods/services analysis

## Writing and advertising the tender/RFP

- Writing the proposal and specifications to attract high quality bids
- How prescriptive should your specifications be?
- The role of performance based specifications
- How to apply TCO
- Tailoring your contract to guarantee the terms and outcomes
- meet your needs
- Incorporating performance measures into your contract
- The pre-qualification process - when to use it

## Examining the sign-off and approval process

- Analysis of the role of the sponsor and user group in the tender/ RFP process
- How to develop your business case before the approval meeting
- What techniques are available for streamlining the approval process?
- Successful techniques for how to plan and staff the evaluation team
- How to be objective and fair when assessing tenders/RFP's

## Developing effective evaluation models for the tender/RFP process

- What are the most effective evaluation methodologies available?
- Effective techniques for filtering tenders/RFP's to reduce effort while increasing effectiveness
- Best practice techniques for documenting evaluation models

## Best practice procedures for rejecting proposals

- How to rank and shortlist tenders/RFP's
- Designing benchmark criteria to evaluate expressions of interest and bids
- Establishing a review panel: Who should be involved?
- Effectively assessing negotiable contractual arrangements
- Recognising the signs of minimum compliance
- What is tolerable risk and how do you assess it?
- How do you assess costs?

## Evaluating your suppliers - developing key measures for a total cost and value approach

- What are the roles and responsibilities of a procurement manager in the supplier relationship?
- Creating a supplier development plan
- Developing tools and techniques that can be applied to any supplier relationship
- The future of supplier relationships in the electronic age
- Assessing the value of moving to a partnership agreement
- How to move towards a total cost value partnership

## Managing the legal issues in the process

- The growing demand for performance- based contracts
- Determining the rewards/penalties to encourage contractor performance
- What do you do when it all falls apart?
- The remedies available for breach of contract including damages, specific performance and injunctions
- Examining the risk factors for the claimant
- Termination of the agreement

## Post tender/RFP activities: Negotiating and awarding the contract

- Methodologies for responding to client queries
- Advising the successful applicant
- Obligations regarding tender/RFP rejection
- The legal pitfalls
- Post tender/RFP negotiations
- RFP tags
- Letters of intent

# About these courses

## WINNING TENDERS: PREPARING, WRITING AND SUBMITTING SUPERIOR TENDER PROPOSALS

In today's highly competitive market, the chances of winning a competitive tender or request for proposal (RFP) bids are becoming slimmer. For this reason it is essential that proposals for these bids are well prepared, concisely written and appropriately targeted to the client. The techniques and tools must be mastered to ensure your success in winning the contract.

The course covers the entire process of identifying and evaluating tenders, choosing the most appropriate tender/RFP, preparing & writing the proposal and negotiating a win-win contract, this course is essential for any executive wanting to strategically increase their chances for success in the tender/RFP proposal process.

## SERVICE LEVEL AGREEMENTS

Successful negotiation, documentation and management of service level agreements is designed to help managers overcome the challenges of ensuring adequate performance when contracting in today's business environment. This course will help you to understand the business implications and nature of purchaser-provider relationships by introducing performance measures and management practices that will ensure the success of these relationships.

By applying effective contracting strategies and efficient structuring of service level agreements this course will help you to improve your business performance and reduce costs.

## TENDER PREPARATION AND EVALUATION TECHNIQUES

Whether your organisation is seeking better prices or services from its suppliers, or contracting out and outsourcing areas of activity, effective tender/RFP preparation is a way of assessing what a competitive marketplace can offer. Effective tendering techniques are now being employed by organisations as a way of ensuring that they are contracting with the suppliers that have the best prices and levels of service.

### WHO SHOULD ATTEND THESE COURSES?

- Contract managers
- Bid managers
- Tender managers
- Business development managers
- Operations managers
- Commercial managers
- Quantity Surveyors & Estimators
- Divisional managers
- Marketing & sales executives
- Procurement managers
- Business managers
- Project managers
- Technical services managers
- CEO's, General Managers & Managing Directors
- Consultants

### TRAINING METHODOLOGY

The emphasis is on a practical, easy-to-follow process rather than a rigorous theoretical dissertation. These two-day workshops will use case study examples and group exercises as well as tutorial sessions. All attendees will be provided with a workbook and a certificate of attendance.

## REGISTER TODAY!

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## Winning Tenders

## Service Level Agreements

## Tender Preparation and Evaluation Techniques



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SEMINAR: SE040/SE039/SE020 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

### 1st Delegate

Name (Mr/Ms/Mrs/Miss/Dr) \_\_\_\_\_  
First name Last name

Position \_\_\_\_\_ Email \_\_\_\_\_

Phone \_\_\_\_\_ Mobile \_\_\_\_\_

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### 2nd Delegate

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\*off full price

### Company Details

Company Name \_\_\_\_\_

Postal Address \_\_\_\_\_

City \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Approving Manager \_\_\_\_\_

Job Title \_\_\_\_\_ Email \_\_\_\_\_

Name of Booking Contact \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

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### Course Details

For groups of 4 or more people contact Michael Earley (mike@conferenz.co.nz) on 09 912 3610 to discuss group discounts or in-house training options

	EARLY-BIRD SAVER <small>Register &amp; Play BEFORE date below*</small>	FULL PRICE <small>Register &amp; Play AFTER date below*</small>
Winning Tenders	\$1895 plus GST SAVE \$200 (18 May 2011*)	\$2095 plus GST (18 May 2011*)
Service Level Agreements	\$1895 plus GST SAVE \$200 (16 June 2011*)	\$2095 plus GST (16 June 2011*)
Tender Preparation and Evaluation Techniques	\$1895 plus GST SAVE \$200 (6 July 2011*)	\$2095 plus GST (6 July 2011*)

### TRAIN YOUR TEAM

Register on any two 2-day seminars and save \$500 off the full price or on any three 2-day seminars and save \$1000 off the full price. For larger bookings call (09) 912 3610 or email mike@conferenz.co.nz to discuss further in-house or group training options.

#### Team Discounts

Any two 2 day seminars	SAVE \$500 off total price*
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OR

**REGISTER ONLINE:** www.conferenz.co.nz  
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A tax invoice will be issued upon receipt of registration. **Payment must be received before the event to secure your place.**

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Should you be unable to attend, a substitute delegate is welcome. Alternatively, a full refund less \$300+GST service charge, per registrant, will be made for cancellations received in writing (letter, fax or email) up to ten working days prior to the event. Regrettably, no refund can be made less than ten working days prior to an event. Delegates are responsible for their own travel/accommodation bookings and no compensation will be made should the seminar be rescheduled or cancelled.

Please Note: Conferenz Ltd reserves the right to make any amendments that we may deem to be in the best interest of the seminar.

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