

10½ ways to improve your tender documents

Tenandahalf top tips: February 2018

Whether you are a solicitor, an accountant, a patent or trade mark attorney or a barrister, formal procurement is becoming increasingly prevalent and this trend looks set to continue.

Depending on your point of view this shift either represents a levelling of the commercial playing field or the ultimate torture test. Either way, you need to know how to put together eye-catching and persuasive documents.

The following 10½ top tips will start you on your way but if you'd like more comprehensive guidance, you may be interested in our new special report *How do you build more successful formal tender responses?*, a comprehensive guide designed specifically to help you build more persuasive and more successful formal tender responses.

As a subscriber to *The Top 10½ Tips* you can order your copy for only £157 (a saving of £90). If you'd like to order a copy, please [click here](#) or, alternatively, if you'd like to download a sample, please [click here](#).

In the meantime, here are the first 10½ top tips ...

1. Can you win?

Tender responses take a great deal of fee earning and marketing time to complete so the first thing to establish has to be "do you stand a realistic chance of winning?" Think about:

- Exactly what is being asked for in terms of technical/legal skills
- Whether you have the experience and the fee earners in place to provide everything being asked for
- Whether you can provide specific examples of similar work or similar clients
- Whether you can meet the precise service and delivery demands of the purchaser

Although it may not be the answer you want the truth is if you can't cover off all of the points on this list, the chances are you will not be successful so it's probably not worth pursuing.

2. Planning will prevent poor performance

While everyone involved will be itching to start writing, never forget the planning stage is absolutely crucial.

Not only will taking the time to plan how you'll answer each part of the call for tender properly improve the final outcome, it'll also make finding and structuring the content quicker and easier in the later stages.

3. Evidence is essential

Once your preparation has given you a list of key points you need to answer you need to find the supporting evidence to show that beyond any reasonable doubt you have:

- The required technical legal experience
- Examples of delivering your legal services using the requested (or at least similar) service provision vehicles
- Experience of working with similar clients
- Experience of working within/for similar sectors or groups

4. Many hands make light (or at least slightly lighter) work

Share out the information gathering amongst the fee earners involved as it'll make the exercise more time efficient.

And if you're struggling to work out who should be finding which bit, the best thing to do is task the fee earner/s who did the relevant work with reporting on it because they will be the people who will be able to recall (or remind themselves about) the detail and it's detail, largely speaking, that wins tenders.

5. By any means necessary ...

Try to use any opportunity to engage with the purchaser ahead of submitting your tender document because you are more likely to be successful if sort of connection exists.

In some cases you may already have one but if you don't, take advantage of any email Q&As or conference calls the purchaser offers or try and set up a call to clarify any points you don't fully understand.

6. It's not all about you (pt1)

I still see far too many tender documents that start with pages and pages of information about the firm and its fee earners or their year of incorporation or how many offices they have. Yes, it's important but it should be included later in your response (a point I'll come back to soon) and should never be your opening gambit.

Successful tendering is about answering the call for tender. It's about working towards establishing yourself as the right choice once the purchaser is clear you have a full grasp of what they need. It's absolutely not about drowning the adjudicator with advertorial; that approach could well lose them before you get to the meat of your submission ... however good it is.

7. It's not all about you (pt2)

Similarly you need to get your language right. Too many firms still write from the firm's perspective rather than the purchasers' but if you think about normal life, when you try and talk someone into doing something (and that's all the tender process is) you would always try and direct the conversation around the person you are talking to, not around yourself.

Always direct your submission towards the reader ("you") rather than the writer ("we"). The way we often explain this to clients is simply to use the find/replace function in Word and change every 'we' to a 'you' and then work backwards so the sentences make sense.

8. Bring your submission to life

I can't stress how much case studies (even anonymous ones) and client testimonials will add to your tender documents. It is all very well saying what you can do but if you can back that up with real life examples and – better still – voice your clients satisfaction alongside those examples, you will produce much more persuasive submissions.

With testimonials it is always better to have the name, job title and company name attached to them but even if you have "MD of an AIM listed PLC" they will still add weight to your response.

With case studies, these should be around 150 - 200 words so the reader can get the key points without having to wade through too much text.

9. Always include a contents page

This is the first thing a reader should see; it allows them to turn straight to the page they're interested in and generally makes your document look more complete, more professional and easier to use.

10. Use appendices

In point 6 we said don't prefix your response with loads of bumph about your firm. To hold your adjudicators' attention you need to get to the point and stick rigidly to it.

However, that doesn't mean you shouldn't include all of that detail. You definitely should but include it within clearly labelled appendices that don't clog up your response but that people can refer to if/when they need to.

10½. Don't shy away from the price

Adding the costs information is sometimes the part many professional services firms find uncomfortable. Don't be; your purchaser has called for tender, they know they will have to pay for your services.

The main thing is to stay mindful of the budget available. If the purchaser has outlined a maximum price they'll accept, don't go over to it or you'll be discounted immediately. Always try to come in under it – even if it's only by £100. It'll win you a few much needed brownie points.

And always show your workings. People want to know exactly what the costs cover and how they are broken down in case the purchaser needs to negotiate on the content and make savings on things they don't strictly need.

Can we help your professional service firm grow?

If you would like to discuss any aspect of your firm, practice or chambers' marketing or business development please email claire@tenandahalf.co.uk and book your FREE initial 45 minute consultancy.



www.tenandahalf.co.uk
info@tenandahalf.co.uk