***Delete this instruction and information page before sending your Invitation to Tender (ITT) to suppliers***

Thank you for downloading this free version of the [Procurement Cube](https://procurementcube.org/) *Invitation to Tender (ITT) template*. It has been developed based on decades of procurement experience. The template is intended to be straight forward and easy to use, while still providing adequate structure for you to conduct an effective tender process.

Please customise all highlighted areas of the ITT template below and remove all drafting notes and brackets before sending your ITT to suppliers.

About Procurement Cube

Procurement Cube is a UK-based consulting firm. Our [Business Focused Procurement](https://procurementcube.org/business-focused-procurement/) approach sets us apart. In fact, it runs through everything we do. We start by asking the right business questions, which enables us to leverage supply markets to create genuine business value. [Click here to read more about us](https://procurementcube.org/about-us/) and watch a brief video about our approach.

Things to consider before sending out your ITT

Strategy alignment

Consider how the purchase you are about to make supports corporate and departmental strategies. Are you inviting the right types of suppliers – the ones that can help your organisation execute on its strategy?

As your organisation grows, having a Procurement strategy in place, which is aligned with corporate strategy, becomes more and more important. If you don’t already have one, [this free guide will help you develop a procurement strategy](https://procurementcube.org/how-to-develop-an-engaging-procurement-strategy/).

Market Research

You need to have a good understanding of what the supply market has to offer to be able to articulate the needs of your organisation in an informed and intelligent way. One way of quickly getting up to speed with latest innovations and solutions is to informally speak to a few top suppliers before you write the ITT.

This will help shape your ITT and improve the quality of the questions you ask, which in turn will provide you with higher quality answers. [This article gives you some more tips](https://procurementcube.org/here-is-a-quicker-way-of-getting-better-supply-market-insights/) on how you can research the supply market in a time effective manner.

Technical specifications vs. outcome specifications

Before completing section 2.0 of the ITT template, think about which type of specifications serve your purpose best. Do you want to provide very detailed technical specifications for the supplier to comply with, or would it be more advantageous to just specify what the solution, product or service does and let the supplier figure out ***how*** to create that outcome?

***Delete this instruction and information page before sending your Invitation to Tender (ITT) to suppliers***

Unless you have a very good reason for providing detailed technical specifications, such as regulatory compliance, outcome-based specifications often work best and are associated with less risk.

How many suppliers to invite?

For each supplier you invite you are increasing your workload (and that of your colleagues), as each submission has to be read and graded. If you want to consider a large number of potential suppliers, it would be advantageous to reduce the number of participants in the ITT process, by first running a less involving Request for Information (RFI) process. This will create a more manageable short list of suppliers for the ITT process. Ideally, the number of suppliers you want to take through the ITT process is probably between 5 and 10.

Wording of questions

The way you ask questions in the ITT document matters in terms of the quality and honesty of responses you get back. As [explained in this article](https://procurementcube.org/get-more-value-from-translation-agencies-while-controlling-costs/), it’s been scientifically proven that open, direct, presumptive questions work well.

Confidentiality

If you consider any of the information included in your ITT document to be confidential, be sure to get suppliers to sign a confidentiality agreement before you send the ITT to them. Also remember that even if you don’t consider the ITT document itself to contain confidential information, you may want to share confidential information at some later stage in the tender process, e.g. when responding to questions from the suppliers. It is, therefore, always wise to have confidentiality agreements in place from the very start.

Disclaimer

*While Content Impact Limited has used commercially reasonable care and skills in the preparation of this document, the content of this document is intended to be for information only, and does not constitute professional advice. Neither Procurement Cube, nor Content Impact Limited, shall be liable for any direct, indirect or consequential loss or damages suffered by anyone as a result of relying on the information in this document. Content Impact Limited is trading as Procurement Cube. The company is registered in England & Wales with Company Number 8553174.*

**Invitation to Tender (ITT) for provision of**

**[Name of service, solution or product you are sourcing]**

**to be supplied to** **[Name of your organisation]**

Date: [date]

|  |  |
| --- | --- |
| Release date | [date you send the ITT to suppliers] |
| Contact name and email | [details of Procurement representative] |
| Supplier response deadline | [date and time] |

[Name of supplier’s organisation]
[Supplier’s address]

[Supplier’s town]

[Supplier’s postcode]

Dear [Name of supplier’s contact person, if known],

Invitation To Tender (ITT) for [Name of service, solution or product you are sourcing]

We believe your organisation may have the required expertise to supply [Name of your organisation] with the above-mentioned [service]/ [solution] / [product]. I am, therefore, pleased to invite you to submit a response to this ITT.

Your participation in this tender is an indication of your acceptance of the guidelines set out in this letter [and attachments].

Please respond to this letter to either:

1. confirm your intention to submit a bid in response to this ITT; or
2. decline to submit a bid in response to this ITT.

If you decide to submit a bid in response to this ITT, please provide the name and contact details of the person in your organisation who will act as Bid Manager and be the point of contact for the purposes of this tender.

Questions regarding this ITT must be submitted in writing and directed to [name and email of Procurement representative], who will be the [Name of your organisation] Procurement representative for the purpose of this tender.

Any questions you submit, and the associated answers, will be shared with all suppliers who have confirmed the intention to submit a bid in response to this ITT. The questions and answers will be shared in anonymised form.

You must not contact other [Name of your organisation] employees unless directed to do so by the [Name of your organisation] Procurement representative. We reserve the right to disqualify or reject proposals from suppliers who do not comply with these guidelines. All questions should be submitted in writing either by post or to the email address below.

Only information submitted by your Bid Manager to the [Name of your organisation] Procurement representative will be taken into account in this tender process.

[Name of your organisation] is under no obligation to:

1. reimburse any costs a supplier may incur in connection with preparing and submitting a bid in response to this ITT; or
2. award the contract to the supplier submitting the lowest bid; or
3. award the contract to any supplier; or
4. invite suppliers submitting responses to this ITT to any future ITTs.

I look forward to receiving your response.

Yours sincerely,

[Name of Procurement representative]

[Name of your organisation]

[email of Procurement representative]

***All information in this document is confidential. [Name of your organisation] is the copyright owner of this document.***

***Any disclosure, in whole or in part, to third parties is subject to prior written consent from [Name of your organisation]***

***Recipients of this document may only use its content for the purposes of preparing a response to this ITT.***

***Any bid received by [Name of your organisation] in response to this ITT is subject to contract.***

Table of Contents

[1.0 Introduction & Overview 7](#_Toc57569731)

[1.1 Company Background 7](#_Toc57569732)

[1.2 Project Background 7](#_Toc57569733)

[2.0 Description of requirement 7](#_Toc57569734)

[3.0 Responses from suppliers 7](#_Toc57569735)

[3.1 ITT questions 7](#_Toc57569736)

[3.2 Supporting documents 7](#_Toc57569737)

[4.0 Response guidelines 7](#_Toc57569738)

[5.0 Tender Assessments 8](#_Toc57569739)

[6.0 Timetable 9](#_Toc57569740)

# 1.0 Introduction & Overview

## 1.1 Company Background

[Brief section with key information about your organisation]

## 1.2 Project Background

[Description of how/why the requirement emerged, what the key issues are and any other context that would be helpful for the supplier to be aware of]

# 2.0 Description of requirement

[Outline any specifications. When describing what it is you are seeking to procure, be sure to also describe the *outcome* you expect from the solution, service or product]

# 3.0 Responses from suppliers

## 3.1 ITT questions

[Outline the questions you want suppliers to answer. [This article](https://procurementcube.org/get-more-value-from-translation-agencies-while-controlling-costs/) shares some ideas of how you can come up with good questions, using suppliers of translation services as an example. You may want to list the questions in an embedded Excel answer template to make it easier to compare supplier submissions]

## 3.2 Supporting documents

[List supporting documents you want suppliers to submit, including any templates or forms they need to complete]

# 4.0 Response guidelines

[Outline any specific formats you want suppliers to use for their submissions and reiterate exactly which documents you need them to submit]

In your response, please state:

1. the reason if you are unable to submit any of the requested information; and
2. any assumptions made when preparing your response to this ITT

Questions regarding this ITT must be in writing and directed to [name and email of Procurement representative], who will be the [Name of your organisation] Procurement representative for the purpose of this tender.

Any questions you submit, and the associated answers, will be shared with all suppliers who have confirmed the intention to submit a bid in response to this ITT. The questions and answers will be shared in anonymised form.

[Name of your organisation] will make reasonable commercial efforts to respond to questions within [number] working days, or within timescales advised on a case by case basis.

If any answer materially affects the ITT requirements, an amendment to the original requirements will be issued to all suppliers who have indicated an intention to respond to this ITT.

You must not contact other [Name of your organisation] employees unless directed to do so by the [Name of your organisation] Procurement representative. We reserve the right to disqualify or reject proposals from suppliers who do not comply with these guidelines. All questions should be submitted in writing either by post or to the email address below.

Only information submitted by your Bid Manager to the [Name of your organisation] Procurement representative will be taken into account in this tender process.

[Name of your organisation] reserves the right to issue changes to this ITT at any time. Should this occur, [Name of your organisation] will notify all suppliers who have indicated an intention to respond to this ITT.

All information provided by [Name of your organisation] throughout this tender process is confidential.

# 5.0 Tender Assessments

Shortly after the deadline for submitting responses to this ITT has lapsed, [Name of your organisation] will confirm receipt of any received tender submission and also confirm whether such submission complies with *Response guidelines* outlined in this ITT.

Scoring and ultimate selection of the winning bid will be based on a mixture of the following criteria listed alphabetically (i.e. not in order of importance):

[Amend criteria below as appropriate]

* Ability to adapt to changing requirements
* Continuous improvement plans
* Cultural fit
* Financial stability
* Price
* Quality
* Relevant experience
* Strategic fit
* Understanding of requirements

# 6.0 Timetable

The following timescales are for guidance only and are subject to change.

|  |  |
| --- | --- |
| **General**  | **Date** |
| **ITT release** | **[date]** |
| **Confirm intention to bid**  | **[date]** |
| **Deadline for submitting questions** | **[date and time]** |
| **Deadline for submitting responses to this ITT** | **[date and time]** |
| **Confirmation of receipt and compliance** | **[date]** |
| **Short listing of suppliers for interview**  | **[date]** |
| **Interviews** | **[date]** |
| **Selection of winning bid** | **[date]** |
| **Contract implementation complete** | **[date]** |