

Briefing sessions, site meetings & Information sessions

By Werner van Rooyen, Director of HowToTender (Pty) Ltd which specializes in tender consulting and tender training.

If you have ever responded to a request for quotation or a competitive bid you will have encountered a Briefing Session, Site Meeting, or Information Session. These are meetings that are held before the quotation or a competitive bid (tender) is due.

Most of the time these sessions are compulsory and not attending it can and might most probably lead to your tender response being disqualified.

Here are a few things that you must remember or do when you attend one of these sessions:

1. **Be on time** – in the old days you could arrive an hour late and you would still be allowed to enter the session. Not anymore. They lock the doors – you will not be able to get in. The cut-off time is usually stated in the tender document or in the tender advertisement.
2. **Sign the attendance register** – remember to sign the attendance register in the name of the company that you are going to respond in. Many people have multiple companies. Ensure that you use the name of the company that will respond to the tender. When attending the session and you know you are going into a Joint Venture to the tender then use the Joint Venture's name.
3. **Buy the tender document** – If you must purchase the tender document beforehand – especially at municipalities – go at least an hour before the sessions starts. Remember that you are not going to be the only person attending the session and there will most probably be other people queuing to buy the document as well. This might cause you to be late and not be able to attend the session.
4. **Ask questions** – the information session is the time to ask questions. You will not get a better opportunity to ask questions. Quickly scan the scope of the tender as well as other requirements and ensure you know exactly what is required from you by asking questions during the session.
5. **Check out your competition** – this is the time to see what your chances of winning the tender are. If there are only three or four attendees at the session, then you know you are in with a chance but if there are three hundred attendees you know it is going to be tuff to win the tender.
6. **Take your partner/subcontractor with** – If you are going to respond using a Joint Venture partner or a subcontractor, it might be a clever idea to take them along to the session. Let them get the information first-hand as second-hand information is not as comprehensive.
7. **Evaluate the opportunity** – sometimes tender descriptions are vague. You might think that the tender opportunity is for you but once you have attended the session you might think twice in responding to the tender. Responding to tenders is time consuming and there is always a cost involved. Evaluate the situation and determine if it is for you or not.
8. Finally, we always recommend that the person or persons that are going to be responsible for responding to the tender must attend the Briefing session. Vital information is shared at these sessions. If you are not there your tender response might be non-responsive because of information that you did not provide. Do not send your driver or secretary to attend. We have attended sessions during which new closing dates for tender submissions have been announced, and if you did not attend the session, you would have the wrong closing date.

If you follow these guidelines your chances of being awarded a tender will increase tremendously.

To learn more about this and many other tender conditions attend our “Become a Tender Expert” 2-Day workshops presented in Johannesburg, Pretoria, Durban, Port Elizabeth, and Cape Town. Book and pay online at <https://howtotender.co.za/tender-expert-form/>

Contact us at estelle@howtotender.co.za should you require more information.

You can also purchase a Tender Manual (Handbook) on our website <https://howtotender.co.za/> which is a step by step guide how to respond to a South African Tender. It includes examples of completed SBD forms.