



LM055: Procurement Planning and Bid Management

Training Description:

Effective procurement planning and bid management are critical functions that enable organizations to achieve value for money, ensure transparency, mitigate risks, and support strategic business objectives. This intensive training course provides participants with the knowledge, tools and best practices required to develop procurement plans, manage tendering and bidding processes, evaluate suppliers, negotiate contracts and ensure compliance with procurement regulations and corporate governance requirements.

Participants will gain practical insights into procurement lifecycle management, bid preparation and evaluation methodologies, supplier relationship management, contract award procedures and risk management techniques. Through case studies, practical exercises and real-world examples, attendees will learn how to establish efficient procurement strategies that drive operational excellence and organizational performance.

Training Objectives:

By the end of the training, participants will be able to:

- ✓ Understand the complete procurement planning and bid management lifecycle
- ✓ Develop comprehensive procurement plans aligned with organizational objectives
- ✓ Apply strategic sourcing and procurement methodologies
- ✓ Prepare effective tender and bidding documents
- ✓ Manage competitive bidding processes transparently and efficiently
- ✓ Conduct technical and commercial bid evaluations
- ✓ Identify and mitigate procurement risks
- ✓ Implement supplier qualification and selection processes
- ✓ Apply negotiation strategies for procurement success
- ✓ Manage contract award and post-award activities
- ✓ Ensure compliance with procurement policies, regulations and ethical standards
- ✓ Improve procurement performance through key performance indicators (KPIs)

Training Designed for:

This training course is intended for Procurement Managers, Purchasing Managers, Supply Chain Professionals, Contract Administrators, Tender and Bid Managers, Project Procurement Personnel, Sourcing Specialists, Commercial Managers, Logistics and Materials Managers, Government Procurement Officers, Vendor Management Professionals, Finance and Audit Personnel involved in procurement, Project Managers involved in procurement activities and Anyone responsible for planning, tendering, bidding, and supplier management.

Training Requirement:

“Hand’s on practical sessions, equipment and software will be applied during the course if required and as per the client’s request.”

Contents can be adapted to your specific wishes. It is therefore possible to focus on specific modules of the training course as per client’s learning needs and objectives. Further, it should be forwarded to us a month prior to the course dates.

Training Program:

DAY ONE:

FUNDAMENTALS OF PROCUREMENT PLANNING

- ❖ **Session 1: Procurement Management Framework**
 - Procurement principles and objectives
 - Strategic role of procurement
 - Procurement lifecycle overview
 - Procurement governance and compliance
 - Public vs private sector procurement
- ❖ **Exercise:**
 - Procurement maturity assessment
- ❖ **Session 2: Procurement Planning Process**
 - Procurement planning fundamentals
 - Demand forecasting techniques
 - Spend analysis and procurement needs identification
 - Procurement budgeting considerations
 - Resource planning
- ❖ **Exercise:**
 - Developing procurement requirements
- ❖ **Session 3: Strategic Procurement Planning**
 - Aligning procurement with business strategy
 - Category management
 - Procurement strategy development
 - Procurement scheduling and timelines
 - Stakeholder engagement
- ❖ **Exercise:**
 - Procurement planning case study
- ❖ **Session 4: Risk Assessment in Procurement Planning**
 - Procurement risk identification
 - Supply chain risks
 - Market analysis and supplier risks
 - Risk mitigation planning
 - Business continuity considerations
- ❖ **Exercise:**
 - Procurement risk register development

DAY TWO:

TENDERING AND BID PREPARATION

- ❖ **Session 1: Tendering Methods and Procedures**
 - Open tendering
 - Selective tendering
 - Limited tendering
 - Request for Proposal (RFP)
 - Request for Quotation (RFQ)

- Request for Information (RFI)
- ❖ **Exercise:**
 - Selecting appropriate tender methods
- ❖ **Session 2: Preparing Tender Documents**
 - Scope of work development
 - Technical specifications
 - Terms and conditions
 - Commercial requirements
 - Bid submission requirements
- ❖ **Workshop:**
 - Drafting tender documentation
- ❖ **Session 3: Bid Management Process**
 - Bid planning and scheduling
 - Bid communication management
 - Clarification processes
 - Bidder conferences and pre-bid meetings
 - Managing amendments and addenda
- ❖ **Exercise:**
 - Bid management simulation
- ❖ **Session 4: Procurement Ethics and Compliance**
 - Procurement ethics
 - Conflict of interest management
 - Transparency requirements
 - Anti-corruption measures
 - Regulatory compliance
- ❖ **Case Study:**
 - Ethical procurement challenges

DAY THREE:

SUPPLIER EVALUATION AND BID ASSESSMENT

- ❖ **Session 1: Supplier Qualification and Prequalification**
 - Supplier registration processes
 - Supplier capability assessment
 - Financial evaluation
 - Technical capability verification
 - Vendor qualification criteria
- ❖ **Exercise:**
 - Supplier assessment matrix
- ❖ **Session 2: Technical Bid Evaluation**
 - Technical evaluation methodology
 - Compliance assessment
 - Evaluation scoring models
 - Technical clarification management
 - Evaluation committee responsibilities
- ❖ **Exercise:**
 - Technical bid evaluation

❖ Session 3: Commercial Bid Evaluation

- Price analysis techniques
- Total cost of ownership (TCO)
- Commercial comparison methods
- Cost-benefit analysis
- Financial risk assessment

❖ Exercise:

- Commercial evaluation exercise

❖ Session 4: Combined Evaluation and Recommendation

- Weighted scoring methodologies
- Best value procurement
- Evaluation reporting
- Recommendation preparation
- Award justification

❖ Practical Exercise

- Full bid evaluation simulation

DAY FOUR:

NEGOTIATION AND CONTRACT AWARD MANAGEMENT

❖ Session 1: Procurement Negotiation Strategies

- Negotiation fundamentals
- Preparing for negotiations
- Negotiation styles and techniques
- Managing supplier relationships
- Negotiation ethics

❖ Role Play

- Procurement negotiation simulation

❖ Session 2: Contract Formation and Award

- Contract award procedures
- Contract structures and types
- Award notifications
- Contract finalization
- Mobilization requirements

❖ Exercise:

- Contract award process mapping

❖ Session 3: Procurement Contract Risk Management

- Contractual risk identification
- Performance guarantees
- Insurance requirements
- Liquidated damages
- Change management

❖ Exercise:

- Contract risk assessment

❖ Session 4: Supplier Performance Management

- Supplier performance measurement
- Service level agreements (SLAs)

- Vendor scorecards
- Performance review meetings
- Corrective action plans

❖ **Exercise**

- Supplier performance evaluation

DAY FIVE:

ADVANCED PROCUREMENT PLANNING AND BID MANAGEMENT

❖ **Session 1: Strategic Sourcing and Category Management**

- Strategic sourcing methodologies
- Category strategies
- Market intelligence
- Supplier segmentation
- Long-term sourcing plans

❖ **Exercise**

- Category management planning

❖ **Session 2: Digital Procurement and E-Tendering**

- E-procurement systems
- Electronic tendering platforms
- Procurement automation
- Data analytics in procurement
- Emerging procurement technologies

❖ **Demonstration**

- Digital procurement tools

❖ **Session 3: Procurement Performance Measurement**

- Procurement KPIs
- Cost savings measurement
- Procurement dashboards
- Procurement audits
- Continuous improvement initiatives

❖ **Exercise**

- KPI development workshop

❖ **Session 4: Integrated Procurement Planning and Bid Management Case Study**

- End-to-end procurement project
- Procurement planning
- Tender preparation
- Bid evaluation
- Contract award recommendation

❖ **Final Exercise:**

- Participants will complete a comprehensive procurement and bid management simulation covering the entire procurement lifecycle and present their procurement strategy and award recommendation.

❖ **Course Conclusion**

❖ **POST-ASSESSMENT and EVALUATION**

Training Methodology:

This interactive training course includes the following training methodologies as a percentage of the total tuition hours:

- 30% Lectures, Concepts, Role Play
- 70% Workshops & Work Presentations, Techniques, Based on Case Studies & Practical Exercises, Gamification, Software & General Discussions
- Pre and Post Test

Training Certificate(s):

CMCT Internationally recognized certificate(s) will be issued to each participant who completed the course.

Training Fees:

USD\$ TBA - This rate includes participant's manual, hand-outs, buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

Note: The 5% VAT (Value Added Tax), will be effective starting 01st of January 2018 as per the new regulation from the UAE Government. The VAT applies for all quotation both for local and abroad.

Training Timings:

Daily Timings:

07:45 - 08:00	Morning Coffee / Tea
08:00 - 10:00	First Session
10:00 - 10:20	Recess (Coffee/Tea/Snacks)
10:20 - 12:20	Second Session
12:20 - 13:00	Recess (Prayer Break & Lunch)
13:00 - 14:00	Last Session

For training registrations or in-house enquiries, please contact:

Aisha Relativo - Training & Career Development Manager

aisha@cmc-me.com / training@cmc-me.com

Tel.: +971 2 665 3945 or +971 2 643 6653 | Mob.: +971 52 2954615