

Getting Started

ebook



Tender Writing Checklist for Field Service Businesses



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Ready to
grow?

Introduction



You're ready to start tendering for service and maintenance contracts, which means you're a growing field service business with the resources to do bigger jobs.

The problem is, for small and medium-sized businesses writing a tender can be overwhelming - especially if you can't (or don't want to) hire a tender writing agency to help.

We've got you covered. This handy checklist will help you make sure you have all the important elements in your bid, and that it's well written and engaging.

We'll cover:

- Gathering research
- Writing the tender
- Proofreading

Here's to winning contracts!

Plus, check out our blog series on tendering for a contract, starting with 'Should You Tender for a Contract?' for more details on each of the steps.



Step 1:

Gather your research

Having your resources organised and on hand can help you answer the questions in a tender, so open these websites and get these documents together before you get started.



Websites/Tech

Researched?

- ☐ Your business website.
- ☐ Website of the buyer/client.
- ☐ Websites of whatever certifying bodies you're certified with.
- ☐ Your field service management software. (So you can pull out relevant data from your reports.)



Policies/Manuals

- ☐ Health and safety policies and manuals.
- ☐ Corporate social responsibility policy.
- ☐ Environmental policy.
- ☐ HR policy.
- ☐ Data protection and security policy.
- ☐ Anti-bribery and anti-corruption policy.
- ☐ Training manuals.
- ☐ Employee recruitment policy.





Certifications (If you have them)

Researched?

- ☐ ISO certifications.
- ☐ CHAS accreditation.
- ☐ TrustMark registration.
- ☐ Other certifications, accreditations, and memberships you hold.



Other Documents

- ☐ Insurance certificates.
- ☐ Any documents and info from the buyer related to the contract.
- ☐ Financial documents.
- ☐ Employee information (including CVs).
- ☐ Relevant customer testimonials.
- ☐ Proof that you're an "equal opportunities employer".
- ☐ Bank details, including your account number and sort code.

Don't worry that you might be missing something...later we'll show you how to keep your momentum going even if you're missing a key piece of information as you write.



Step 2:

Write the tender

Once you have your materials ready, it's time to start writing. Once you've created your draft using the resources you gathered, go through and make sure the tender has these key elements of style and content.



Writing style

| | Yes |
|--|--------------------------|
| <input type="radio"/> Sentences are short, clear, and readable. | <input type="checkbox"/> |
| <input type="radio"/> We use bullet lists and other types of formatting to break up the copy and make it more readable. | <input type="checkbox"/> |
| <input type="radio"/> We use short, clear words and not long, complicated jargon. | <input type="checkbox"/> |
| <input type="radio"/> Every statement is backed up with data or statistics. | <input type="checkbox"/> |
| <input type="radio"/> We focus on the benefit to the client instead of how great we are (Hint: Count the number of times you say 'we' in the tender). | <input type="checkbox"/> |
| <input type="radio"/> We fully answer the questions the buyer is asking. | <input type="checkbox"/> |
| <input type="radio"/> Our answers address the buyer's underlying problems. (Buyers are looking for solutions, but you have to figure out what the problem is! Why is the buyer asking for bids?) | <input type="checkbox"/> |
| <input type="radio"/> We use the active voice (XYZ Heating installed the boilers) instead of the passive voice (The boilers were installed by XYZ Heating) where possible. | <input type="checkbox"/> |
| <input type="radio"/> Our costings and other calculations are correct. | <input type="checkbox"/> |

Tip:

If, as you're writing your tender, you discover you're missing an important piece of data, do what professional journalists do: Drop in the abbreviation TK and keep moving. You can fill in the holes later. (TK stands for 'to come'; journalism experts theorise the K is because there aren't many words with TK in them, making the abbreviation easier to find later.)



Step 3:

Proofread your tender

Go through your tender one more time to get rid of any tiny errors you may have missed. First, use your writing software's spell check and grammar check functions to catch the most obvious problems. Then do a final sweep for mistakes using these three strategies.



Proofreading

Yes

- Read the tender out loud.
- Read the tender backwards
- Print out the tender and read the hard copy.

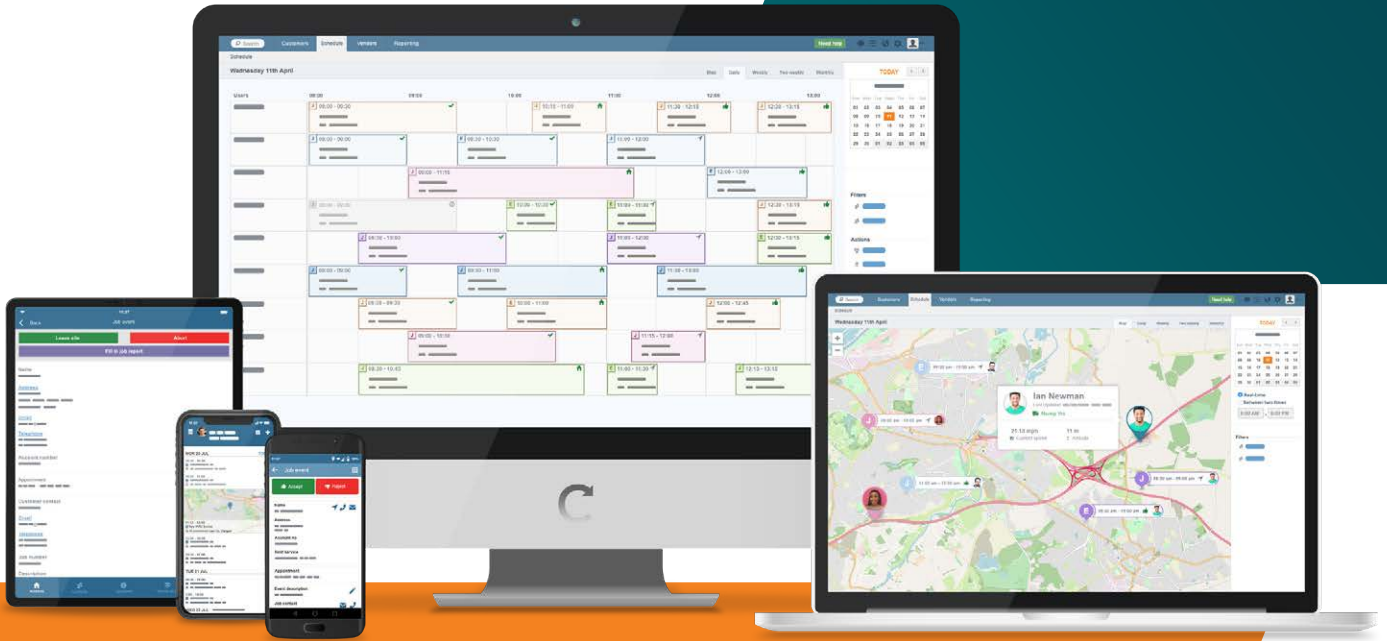
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Common Problems to Look For

No

- TKs left in the document.
- Spelling errors/ typos.
- Grammatical errors
- Formatting or consistency issues with bullet point or numbered lists.
- Inconsistent font usage. (See what we did there?)
- Inconsistent "voice". (Especially important if other people have contributed to the tender.)
- Inconsistent punctuation. E.g. if you use an Oxford comma before 'and', 'or', or in a list of three or more items, do so throughout.
- Sentence fragments.
- Using the wrong word: they're/their/there, it's/its, you're/your, loose/lose, we're/were, etc.
- Run-on sentences.

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Ready to Grow?

By now your tender should be error free. Sloppy writing reflects badly on your business, so taking care of these little mistakes in your tender will make you look professional, organised... and ready to take on a contract.

What next?

When your tenders start winning contracts, you'll need a system for keeping track of your jobs, your engineers, and your documentation. Commusoft creates workflow management solutions that can help with all of those things - and more.

*Discover how Commusoft can help you keep track with our
Service Contract Management solution!*

Learn more!