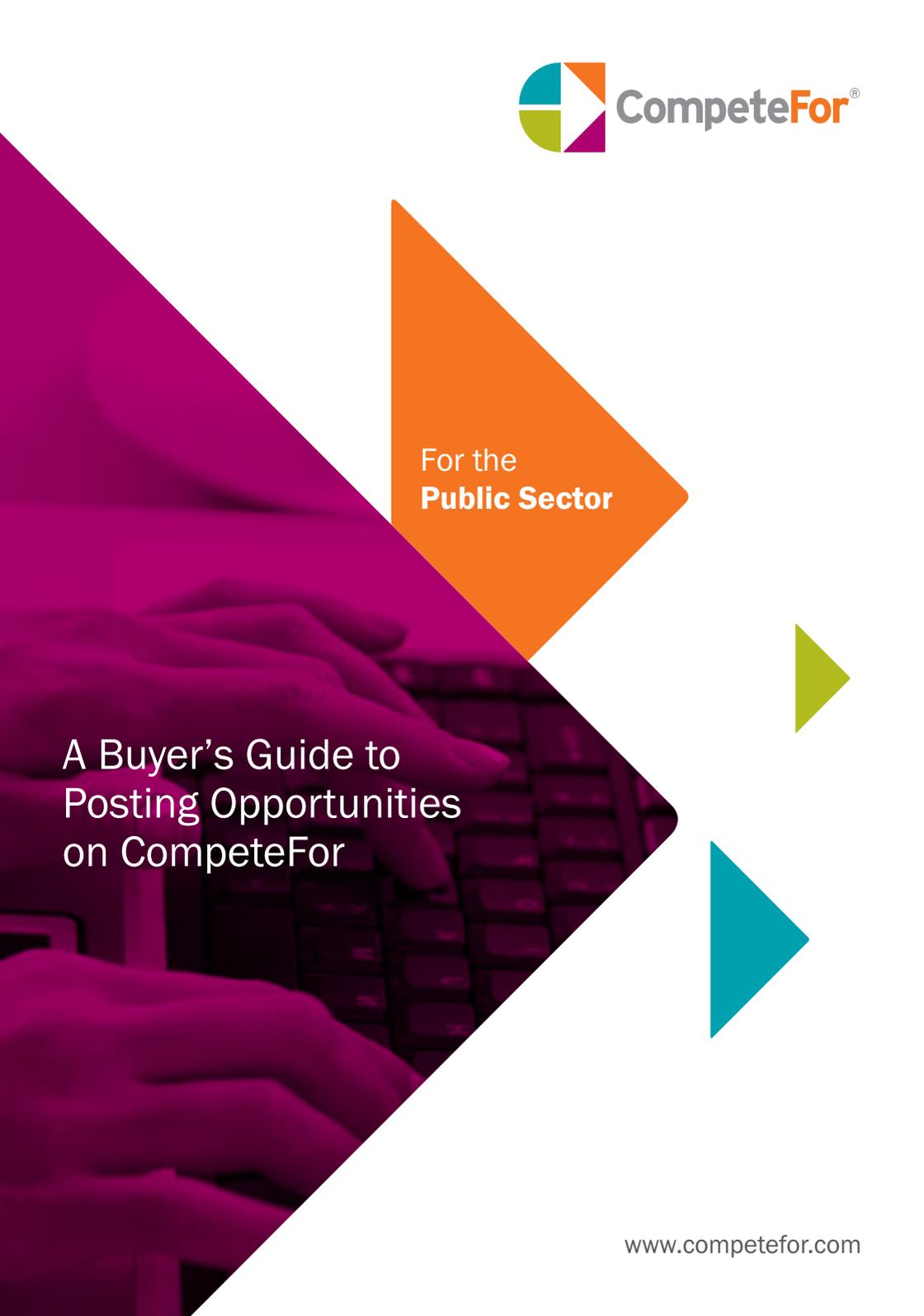




For the
Public Sector



A Buyer's Guide to
Posting Opportunities
on CompeteFor





CompeteFor enables
public and private sector
buyers to access new and
innovative suppliers



Contents

What is CompeteFor?	5
Registering Your Organisation	6
How Can Public Sector Buyer's Use CompeteFor	9

Posting a Contract Opportunity – 6 Simple Steps

Step 1 Opportunity Details	11
Step 2 Asking Standard Questions	12
Step 3 Asking Customised Questions	13
Step 4 Scoring Your Questions	14
Step 5 Supplier Statements	15
Step 6 Publishing Your Opportunity	16

Managing an Opportunity

Supplier Longlists	18
Supplier Shortlists	20
Awarding Your Contract	22

Posting a Notice Only Opportunity

Posting a Request for Quote

Frequently Asked Questions	27
Buyer Engagement Team	30



CompeteFor is used by public sector organisations to enhance their existing procurement procedures



What is CompeteFor?

CompeteFor is a pre-procurement tool that enables public sector buying organisations and their contractors to access and pre-qualify new and innovative suppliers. It began as a brokerage service matching buyers with potential suppliers throughout the London 2012 supply chain. It is now being used across the Greater London Authority group and local authorities to give businesses free access to their procurement opportunities, supporting local policies around economic development and public sector procurement.

Providing access to new and innovative suppliers

CompeteFor is designed to complement, rather than replace, the existing procurement processes of public sector buyers. The website allows you to shortlist suppliers, request quotes or advertise specific contracts. Opportunities can be targeted geographically (e.g. by borough or region) or advertised nationally to the tens of thousands of businesses registered on CompeteFor. It is free and easy to use for both the buyer and supplier and offers procurement efficiencies and transparency of supply chain activity.



Registering Your Organisation

Before posting your opportunity on CompeteFor, you must first create a CompeteFor user account and register some basic details about your organisation.

- ▶ Visit the CompeteFor website at **www.competefor.com** and click on the **Register** link.
- ▶ You will be asked to set up a username and password, and to provide some general information about your organisation. Before proceeding to the next stage, you will be asked to read and accept the CompeteFor Terms and Conditions.
- ▶ Complete the **Organisation** tab within the **Business Profile** section. All the information you have provided in the initial registration section will be automatically replicated. You will also be asked to provide information about the organisation's type and size.

You are now ready to begin posting opportunities.



Buyer tip

If your organisation is already registered with CompeteFor you don't need to create a new account. Simply ask an existing user in your organisation to send you a CompeteFor invitation.



Registration is easy,
free of charge and only
needs to be done once
to post an unlimited
number of opportunities



You'll find everything you need to shortlist suppliers, advertise opportunities or request a quote in the **Buyer Activity Centre**

How Can Public Sector Buyer's Use CompeteFor

CompeteFor has been designed to support the procurement needs of public sector organisations. Buyers can use the website to shortlist suppliers, advertise specific contracts or request quotes. The **Opportunity Method** chosen will depend on internal procurement procedures and public sector procurement rules.

For each opportunity you post you will be asked to select one of the following **Opportunity Methods**:

Contract Opportunity – Create a pre-qualification questionnaire and shortlist potential suppliers – see page 11

Notice Only – Post an advertisement directing suppliers to external e-tendering portals, for example, the Official Journal of the European Union (OJEU) – see page 24

Request for Quote – Use CompeteFor as a supplier directory and request a quote from registered organisations – see page 25



Buyer tip

All **Contract Opportunities** posted on CompeteFor are automatically advertised on Supply2.gov.uk. For full details of the requirements and to apply for the opportunity suppliers are directed to CompeteFor.

Posting a Contract Opportunity – 6 Simple Steps



1 Opportunity Details

CompeteFor enables you to shortlist potential suppliers based on the responses they provide to a set of pre-qualification questions. The first step to posting your contract opportunity on CompeteFor is to provide information about your organisation and the goods, works or services you are looking to buy.

- ▶ Visit the **Buyer Activity Centre** and select **Add Opportunity**
- ▶ Choose the **Opportunity Type** that best describes your organisation and your opportunity
- ▶ Select **Contract Opportunity** as the **Opportunity Method**
- ▶ Complete the fields that follow to provide information on your organisation, the opportunity and your full procurement process
- ▶ If applicable, use the **Document Upload** facility to give suppliers additional information relating to the opportunity
- ▶ Select the business and/or construction categories that correspond to your opportunity in the **Opportunity Matching Criteria** section to match the right suppliers. You will also be asked if you want to target your opportunity geographically or advertise it nationally.
- ▶ Set your opportunity **Dates** and **Deadlines** and click **Next Step**



Buyer tip

To maximise the quality of suppliers responding to your opportunity, choose a clear opportunity name and give as much detail as you can about the contract on offer, including the size and scale of your requirements.

Asking Standard Questions

Putting together a good pre-qualification questionnaire will help you find the right supplier to deliver your contract.

In this section you can ask potential suppliers a range of **Standard Questions**. Standard questions are available for all opportunities posted on CompeteFor and cover areas such as references, finance and company policies.

- ▶ Review the list of **Standard Questions** and select those you want to ask suppliers
- ▶ Click **Next Step** to continue



Buyer tip

Take time to think about the information you really need from potential suppliers and only ask those questions that are relevant to the contract on offer. Unnecessary questions could restrict potentially good suppliers.

3 Asking Customised Questions

You can also ask potential suppliers up to 25 of your own **Customised Questions** that relate specifically to your opportunity. This is your chance to probe suppliers on the specific requirements of your opportunity and will help you select suitably qualified suppliers for your contract. Ask **closed** or **multiple choice** questions to assess specific attributes like numbers of qualified staff, previous relevant experience or delivery timescales.

- ▶ Select **Add Question** and decide whether you wish to ask a **closed** or **multiple choice** question
- ▶ Enter your question into the free-text box and, if it is a **multiple choice** question, add a range of answers for the supplier to select
- ▶ Select **Save** and repeat the steps above to add further questions
- ▶ Click **Next Step** to continue



Buyer tip

Consider what you are looking for in a supplier and question them accordingly. You can save your progress at any stage so you can take your time in devising the right questions. As a general rule, the more customised questions you ask the better quality your shortlist will be.

4 Scoring Your Questions

Allocate points to your **Standard** and **Customised** questions and CompeteFor will filter the best suppliers by ranking respondents according to their scores.

The CompeteFor scoring system is flexible and allows you to allocate points to individual questions based on their importance. You can choose to make closed questions **Essential** so that at a glance you can see which suppliers meet your basic criteria. This also helps potential suppliers understand exactly what is important to you and whether they should apply for the contract.

- ▶ Score each **Standard** and **Customised** question using values between 0 and + 1000
- ▶ Select whether the question asked is **Essential** for your requirements
- ▶ Click **Next Step** to continue



Buyer tip

Allocate more points to the questions that are most important to you. A well considered scoring system will help you differentiate between suppliers and select the best possible shortlist.

Supplier Statements

Help your short-listing process by asking suppliers to provide a statement on how they will meet your exact requirements. **Supplier Statements** will be available alongside the supplier scores on your **Longlist** and will help you come to an informed decision when short-listing.

- ▶ Requesting a **Supplier Statement** is optional and you can choose from a set of three **Standard Requests** or select **Customised Request** and write your own
- ▶ Click **Next Step** to continue



Buyer tip

When requesting a **Supplier Statement** think about the evidence you need from potential suppliers to demonstrate that they can deliver your contract.

Publishing Your Opportunity

Before posting your opportunity, check your information for accuracy and correct any errors. Once you're confident that all the information is correct click **Publish** and your opportunity will be sent to the CompeteFor Helpdesk for approval and publication. This process typically takes one hour (but can take up to a maximum of 24 hours). The CompeteFor Helpdesk is open Monday to Friday, 9am to 5pm.

- ▶ Review the 5 steps taken and correct any errors using the **View Details** button
- ▶ When the status of steps 1, 4 & 5 is marked as **Complete** click **Publish** to post your opportunity



Buyer Tip

To save time in posting similar opportunities, you can copy an existing opportunity and use it as a template. You will need to edit the opportunity details to reflect your new requirements but it may not be necessary to change your questions or scoring system. To copy an opportunity visit the **Opportunity Manager** section, select the contract you wish to copy and click **Copy Opportunity**. Don't forget to remove the word 'Copy' from your new opportunity title.



Once your opportunity is approved and published, email alerts will be sent to all suppliers in the specified region with matching business and/or construction categories

Supplier Longlists

Once your opportunity has been posted and the response deadline has passed, view the **Longlist** of potential suppliers in the **Opportunity Manager** section. Suppliers are ranked by the scores achieved from answering your **Standard** and **Customised** questions. To ensure a fair and equal process, supplier details are kept anonymous at this stage.

- ▶ Go to the **Buyer Activity Centre**, click on **Opportunity Manager** and select the relevant opportunity
- ▶ Select **View Longlist** to see an anonymous list of suppliers and their scores
- ▶ You can also view the respondents' **Supplier Statement** if you have requested one



Buyer tip

In addition to the score achieved by each supplier, you can also see at a glance if a supplier has met your **Essential Criteria** and if they are '**Business Ready**' (e.g. if they have a health and safety policy, a quality management statement and an equal opportunities policy). This will help you differentiate between suppliers and select your shortlist.



You will see
at a glance
if a supplier
has met your
essential criteria

Supplier Shortlists

To create your shortlist, select your suppliers in accordance with your organisation's published criteria.

Once your shortlist is created, the names of the chosen suppliers are revealed. You will be prompted to complete the email template provided to give them details on the next stage of the procurement process. This will normally involve requesting further details and documents outside of CompeteFor.

- ▶ Select the suppliers you wish to take through to your **Shortlist** and click **Create Shortlist**
- ▶ Complete the email template provided to invite your shortlisted suppliers to tender and click **Send Email Now**
- ▶ After sending the first email, it is **important** to click **Close Shortlist** and complete the email template provided to inform unsuccessful respondents that they have not been shortlisted



Buyer tip

Visit the **Opportunity Manager** section to check the status of your opportunity. If the status reads **Tender in Progress** you will know that all successful and unsuccessful suppliers have been informed of the progress of your opportunity.

Once shortlisted, you will take suppliers through your standard procurement selection process



Awarding Your Contract

Once you have chosen your supplier(s) it is important to update CompeteFor with the name of the successful organisation(s). This will conclude the opportunity and allow interested parties to see who has won the contract.

You can award your opportunity to single or multiple suppliers and to businesses whether or not they responded via CompeteFor.

- ▶ Go to the **Buyer Activity Centre**, click **Opportunity Manager** and select the relevant opportunity
- ▶ Click **Create an Award**
- ▶ If you are awarding the opportunity to a CompeteFor supplier, select the successful awardee via the tick box provided
- ▶ If you are awarding the opportunity to a supplier who did not respond via CompeteFor, click **Add details of supplier not on your CompeteFor shortlist** and input the name of the awardee
- ▶ Complete the free-text box to provide feedback to the unsuccessful shortlisted suppliers
- ▶ Input the date of the award and click **Publish Award**



Buyer Tip

It is important to give feedback to unsuccessful suppliers. Feedback will not only help suppliers understand why they have not been selected, it might also help them improve future applications.



You can award your
opportunity to single
or multiple suppliers

Posting a Notice Only Opportunity

For high value contracts, such as those that must be published in the Official Journal of the European Union (OJEU), you can use CompeteFor to advertise your opportunity and signpost suppliers to the relevant tendering portal.

- ▶ Visit the **Buyer Activity Centre**, select **Add Opportunity** and **Opportunity Type**
- ▶ Choose **Notice Only** as the **Opportunity Method**
- ▶ Complete the fields that follow to provide information on your business, the opportunity and your full procurement process
- ▶ If applicable, use the **Document Upload** to give suppliers additional information relating to the opportunity
- ▶ In the **Opportunity Matching Criteria** section select the business and/or construction categories that correspond to your opportunity and decide if you want to target your opportunity geographically or advertise it nationally.
- ▶ Set your opportunity **Dates** and **Deadlines** and click **Next Step**
- ▶ Review the information provided and correct any errors using the **View Details** button
- ▶ Click **Publish** to post your opportunity



Buyer tip

Although the short-listing and tendering process for **Notice Only** opportunities takes place outside of CompeteFor, it is important to update the website with the details of the successful supplier(s). When awarding your opportunity you can select the name of the successful organisation(s) from the CompeteFor supplier list or, if they did not respond via CompeteFor, enter their details manually.

Posting a Request for Quote

For low value contracts you can use CompeteFor to **Request a Quote** from registered suppliers. You can choose up to a maximum of 20 suppliers to ask for a quote. To enhance competition and introduce you to new potential suppliers, CompeteFor will select an additional 2-4 organisations which match your specified criteria.

- ▶ Visit the **Buyer Activity Centre**, select **Add Opportunity** and **Opportunity Type**
- ▶ Choose **Request for Quote** as the **Opportunity Method**
- ▶ Complete the fields that follow to provide information on your organisation, the opportunity and your full procurement process
- ▶ If applicable, use the **Document Upload** facility to give suppliers additional information relating to the opportunity
- ▶ In the **Opportunity Matching Criteria** section select the business and/or construction categories that correspond to your opportunity and decide if you want to select suppliers nationally or by region
- ▶ Set your opportunity **Dates** and **Deadlines** and click **Next Step**
- ▶ Select **Add Suppliers** and search for suppliers by name, postcode, location, business and/or construction category
- ▶ Confirm your chosen suppliers by clicking **Add Selected** and **Publish**
- ▶ Once you have awarded your contract don't forget to **Publish the Award** on CompeteFor



Buyer tip

Once your **Request for Quote** has been published and the suppliers selected, CompeteFor will send you an email detailing the organisations contacted. This email provides a valuable audit trail of the tender process adopted for lower value contracts.



If you have any questions
just call the CompeteFor
Buyer Engagement Team
on 0845 270 7081

Frequently Asked Questions

Is CompeteFor a tendering system?

No. CompeteFor is a pre-procurement tool that matches buyers with potential suppliers. You can use CompeteFor to advertise an opportunity, shortlist potential suppliers or request a quote. Once potential suppliers have been identified you can take them through your standard procurement procedure which will normally involve requesting further details and documents outside of CompeteFor.

What is a Supply Chain ID?

Suppliers who've been awarded business through CompeteFor can be given a Supply Chain ID by the buying organisation and asked to refer to it in any related sub-contract opportunities they post on the system. The Supply Chain ID allows CompeteFor to link together opportunities belonging to the same supply chain and produce management information reports of interest to buyers.

How many questions should I ask potential suppliers?

When you put together your opportunity questionnaire you must ask a minimum of five questions. These can be a combination of **Standard** and **Customised** questions. Bear in mind that the more customised questions you ask the better quality your shortlist will be. Requesting a **Supplier Statement** can also provide you with useful additional information when deciding on your shortlist.

How long should I give suppliers to respond to my opportunity?

The opportunity response deadline should be at least 5 working days after the contract publication date. However, a longer period will ensure potential suppliers have enough time to see and respond to your opportunity and enable you to generate the best possible response to the contract.

Can I monitor the number of responses to my opportunity?

Yes. Whilst the opportunity is open you can visit the **Opportunity Manager** section and view the responses. This will show you how many suppliers have completed their responses, how many have started but not ▶

completed and how many times the opportunity has been viewed. If you have not had as many responses to your opportunity as you would like you can create an **Addendum** to extend the response deadline whilst the opportunity is still open.

Can I change an opportunity once it's been published?

You can create an **Addendum** which allows you to amend some of the information on the **Opportunity Details** page. Items that can be amended include the opportunity description and key dates. You can also upload additional documents. You can't change business or construction categories, pre-qualification questions, or the scoring system. To create an **Addendum** visit the **Opportunity Manager** section, select the opportunity you wish to amend and click **Create Addendum**. Your request is then sent to the CompeteFor Helpdesk for approval and publication.

Can multiple buyers from the same organisation post opportunities on CompeteFor?

Organisations can have as many buyers registered on CompeteFor as they like. To add a new buyer to your organisation's account, simply select **My Organisation**, then **Users** and **Invite New User**.

Can I share opportunity templates with other users in my organisation?

Yes, if you have posted an opportunity that has a description, question-set and scoring criteria that may be of use to other users in your organisation you can share it. Simply visit the **Opportunity Manager** section, select the opportunity you wish to share and click **Share Opportunity Template**. All shared opportunity templates are available to be copied and edited in the **Organisation Opportunity Templates** tab.

Is there someone I can call for help?

Yes, you can call the CompeteFor Buyer Engagement Team who can assist you with all aspects of posting an opportunity and short-listing suppliers. They can be contacted on 0845 270 7081. You can also call the CompeteFor Helpdesk on 0845 217 7804, or 18001 0845 2177804 for callers with impaired hearing, during business hours or email them by clicking the **Contact User Helpdesk** button on the CompeteFor website.



You can also call the
CompeteFor Helpdesk
on 0845 217 7804
or email them via the
CompeteFor website

CompeteFor Buyer Engagement Team

The CompeteFor Buyer Engagement Team offers a range of free support services to help buyers derive maximum benefit from their use of CompeteFor.

The team of experienced procurement specialists can provide training and ongoing support in areas such as building opportunity templates, creating scoring systems and generating supplier shortlists.

You can contact the CompeteFor Buyer Engagement Team on **0845 270 7081** or by email at **opportunities@competefor.com**



The CompeteFor
Buyer Engagement
Team offers a range of
free support services

Useful links and contact details

CompeteFor

www.competefor.com

CompeteFor Buyer Engagement Team

T: 0845 270 7081

E: opportunities@competefor.com

CompeteFor Helpdesk

T: 0845 217 7804 for UK callers

T: +44 845 217 7804 for callers outside the UK

T: 18001 0845 217 7804 for callers with impaired hearing

E: Via the CompeteFor website