



# The Global Standard for Procurement and Supply

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Leading global excellence in procurement and supply

# Segment 6.1 The Stages of a Sourcing Process

**Level:** Tactical

**Theme:** Sourcing

Knowledge: Will know and understand	Capabilities: Will be able to
<p>Reviewing and clarifying requirements from internal stakeholders</p>	<p>Liaise with internal stakeholders to review and clarify requirements to ensure that value for money outcomes are achieved through the sourcing of goods or services</p>
<p>The generation of requests for information or requests for quotations including:</p> <ul style="list-style-type: none"> <li>• Pricing</li> <li>• Delivery timescales</li> <li>• Required quality</li> <li>• Required quantities</li> <li>• Other site information</li> </ul>	<p>Ensure that all required details such are entered onto requests for information or requests for quotations or other documents used in the sourcing process</p>
<p>The analysis and comparison of quotations to achieve value for money outcomes when creating purchase orders</p>	<p>Compare and evaluate quotations received from potential suppliers and deal with any queries or concerns about completed documentation</p>
<p>Order placement and contract award</p>	<p>Make recommendations and obtain approvals within delegated levels of authority for the placement or award of contracts</p>

Knowledge: Will know and understand	Capabilities: Will be able to
Performance and delivery aspects of the sourcing process	Ensure that deliveries and commencement of work are in line with stated requirements

## Related CIPS Knowledge Links

[Stakeholders](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Procurement-Organisation/Stakeholders/) - <http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Procurement-Organisation/Stakeholders/>

[Sourcing](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Understand-Need---Market-and-options-assessment/Sourcing1/) - <http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Understand-Need---Market-and-options-assessment/Sourcing1/>

[Sourcing and Tendering](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Supplier---bid---tender-evaluation/Sourcing-and-Tendering/) - <http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Supplier---bid---tender-evaluation/Sourcing-and-Tendering/>

[Supplier Evaluation and Appraisal](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Supplier---bid---tender-evaluation/Supplier-Evaluation-and-Appraisal1/) - <http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Supplier---bid---tender-evaluation/Supplier-Evaluation-and-Appraisal1/>

[Terms and Conditions and the Developing of Contracts](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Developing-and-managing-contracts/Terms-and-Conditions-and-the-Developing-of-Contracts/) - <http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Developing-and-managing-contracts/Terms-and-Conditions-and-the-Developing-of-Contracts/>

[Performance Analysis and Management](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Developing-and-managing-contracts/Performance-Analysis-and-Management1/) - <http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Developing-and-managing-contracts/Performance-Analysis-and-Management1/>

[Value Generation](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Efficiency/Value-Generation1/) - <http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Efficiency/Value-Generation1/>

[Contract Management](https://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Developing-and-managing-contracts/Contract-Management1/) - <https://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Developing-and-managing-contracts/Contract-Management1/>

# Segment 6.2 Effective Tendering

**Level:** Tactical

**Theme:** Sourcing

Knowledge: Will know and understand	Capabilities: Will be able to
The development of invitations to tender comprising of specifications, applicable key performance indicators, contract terms, pricing schedule and other schedules	Compile timely and accurate invitations to tender taking into account the requirements of stakeholders
Approaches to supply market research/early supplier engagement/pre-contract dialogue	Carry out and record discussions with suppliers and markets in appropriate circumstances to develop improved commercial and technical solutions
The use of prequalification questionnaires	Develop and transmit prequalification questionnaires to potential suppliers and check the details included in completed returns
Prequalification of suppliers in E-registration or E-tendering systems	Review potential suppliers that that have completed prequalification making recommendations for their participation
The submission of tenders	Check the details that have been included in tenders completed by potential suppliers and refer any discrepancies to colleagues or suppliers

## Knowledge: Will know and understand

## Capabilities: Will be able to

Evaluation of tenders on the basis of set evaluation or award criteria

Assess tender proposals in line with set evaluation criteria and make recommendations for tender award

Creation of acceptances of submitted tenders

Complete tender award documentation notifying unsuccessful and successful suppliers

Regulations that can impact on tendering

Advise on regulations that affect the tendering process

## Related CIPS Knowledge Links

[Sourcing and Tendering - http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Supplier---bid---tender-evaluation/Sourcing-and-Tendering/](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Supplier---bid---tender-evaluation/Sourcing-and-Tendering/)

[Supplier Evaluation and Appraisal - http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Supplier---bid---tender-evaluation/Supplier-Evaluation-and-Appraisal1/](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Supplier---bid---tender-evaluation/Supplier-Evaluation-and-Appraisal1/)

[Developing and Managing Contracts - Tools and Templates - http://www.cips.org/Knowledge/Tools-and-Templates-revised/Developing-and-Managing-Contracts/Developing-and-Managing-Contracts/](http://www.cips.org/Knowledge/Tools-and-Templates-revised/Developing-and-Managing-Contracts/Developing-and-Managing-Contracts/)

[Confidentiality Agreement - Tools and Templates - http://www.cips.org/Knowledge/Tools-and-Templates-revised/Sourcing-and-Tendering/Confidentiality-Agreement/](http://www.cips.org/Knowledge/Tools-and-Templates-revised/Sourcing-and-Tendering/Confidentiality-Agreement/)

[Market Analysis - https://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Understand-Need---Market-and-options-assessment/Market-Analysis1/](https://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Understand-Need---Market-and-options-assessment/Market-Analysis1/)

# Segment 6.3 Effective Communication in Procurement and Supply

**Level:** Tactical

**Theme:** Sourcing

Knowledge: Will know and understand	Capabilities: Will be able to
<p>Effective writing of letters, e-mails, memoranda and reports to colleagues, suppliers and other stakeholders</p>	<p>Create written correspondence in the form of letters, e-mails, memoranda and reports</p>
<p>Preparing documentation for the sourcing process such as:</p> <ul style="list-style-type: none"> <li>• Requests for information or quotations or invitations to tender</li> <li>• Lotting of requirements</li> <li>• Evaluations of quotations or tenders</li> <li>• Award of acceptances of quotations or tenders</li> </ul>	<p>Complete electronic files and documents used in the sourcing process</p>
<p>Building rapport with internal stakeholders</p>	<p>Develop, maintain and improve relationships with internal stakeholders to promote effective procurement and supply</p>
<p>Building relationships with suppliers and customers</p>	<p>Develop, maintain and improve relationships with suppliers or customers to promote effective procurement and supply</p>

Knowledge: Will know and understand	Capabilities: Will be able to
Negotiating with suppliers and customers	Negotiate with suppliers and customers to agree contract terms and relationships that will achieve the interests of the organisation

All elements of the communication cycle	Ensure that all communications with stakeholders and suppliers are appropriate, prompt and timely
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## Related CIPS Knowledge Links

[Sourcing and Tendering - http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Supplier---bid---tender-evaluation/Sourcing-and-Tendering/](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Supplier---bid---tender-evaluation/Sourcing-and-Tendering/)

[Stakeholders - http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Procurement-Organisation/Stakeholders/](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Procurement-Organisation/Stakeholders/)

[Leadership and Promotion of Procurement and Supply Management - http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/People-and-skills/Leadership-and-Promotion-of-Procurement-and-Supply-Management1/](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/People-and-skills/Leadership-and-Promotion-of-Procurement-and-Supply-Management1/)

[Negotiation - http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Strategy-policy/Negotiation/](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/Strategy-policy/Negotiation/)

[Confidentiality Agreement - Tools and Templates - http://www.cips.org/Knowledge/Tools-and-Templates-revised/Sourcing-and-Tendering/Confidentiality-Agreement/](http://www.cips.org/Knowledge/Tools-and-Templates-revised/Sourcing-and-Tendering/Confidentiality-Agreement/)

[Negotiation - Tools and Templates - http://www.cips.org/Knowledge/Tools-and-Templates-revised/Negotiation/Negotiation-Tools-and-Templates/](http://www.cips.org/Knowledge/Tools-and-Templates-revised/Negotiation/Negotiation-Tools-and-Templates/)