



# 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>The importance of reviewing and clarifying requirements with internal stakeholders</p>	<p>Liaise with internal stakeholders to review and clarify requirements to ensure that value is generated through the sourcing of goods or services</p>
<p>The creation 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 are included in requests for information, quotations or other documents used in the sourcing process</p>
<p>The analysis and comparison of quotations to assess opportunities for value generation 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 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 documented 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 using eRegistration or eTendering systems	Review potential suppliers completing the prequalification process. Make recommendations for participation in the tendering process
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

Tender evaluation activities based on defined evaluation or award criteria

Assess tender proposals against defined evaluation criteria. Make recommendations for the tender award based on outcomes of the assessment

The importance of communicating the acceptance of submitted tenders to suppliers

Complete tender award documentation notifying unsuccessful and successful suppliers

Regulations that impact tendering activities

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/)

[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
The importance of effective written correspondence to colleagues, suppliers and other stakeholders	Create written correspondence in the form of letters, emails, memoranda and reports
The use of mobile technologies, video conferencing and collaboration tools to communicate with stakeholders	Use, promote and advise on mobile technologies, video conferencing and collaboration tools for communicating with stakeholders
How to prepare documents for the sourcing process, including: <ul data-bbox="199 1339 746 1541" style="list-style-type: none"><li>• Requests for information or quotations or invitations to tender</li><li>• Lotting of requirements</li><li>• Tender evaluation documents</li><li>• Award documents</li></ul>	Complete electronic files and documents used in the sourcing process
The importance of building rapport with internal stakeholders	Develop, maintain and improve relationships with internal stakeholders to promote effective procurement and supply

Knowledge: Will know and understand	Capabilities: Will be able to
The importance of building relationships with suppliers and customers	Develop, maintain and improve relationships with suppliers and customers to promote effective procurement and supply
The importance of negotiating with suppliers and customers	Negotiate with suppliers and customers so that secure agreements are in the interest of all parties
The importance of elements of the communication cycle	Ensure that all communications with stakeholders and suppliers are planned, appropriate, prompt and timely

## 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/)