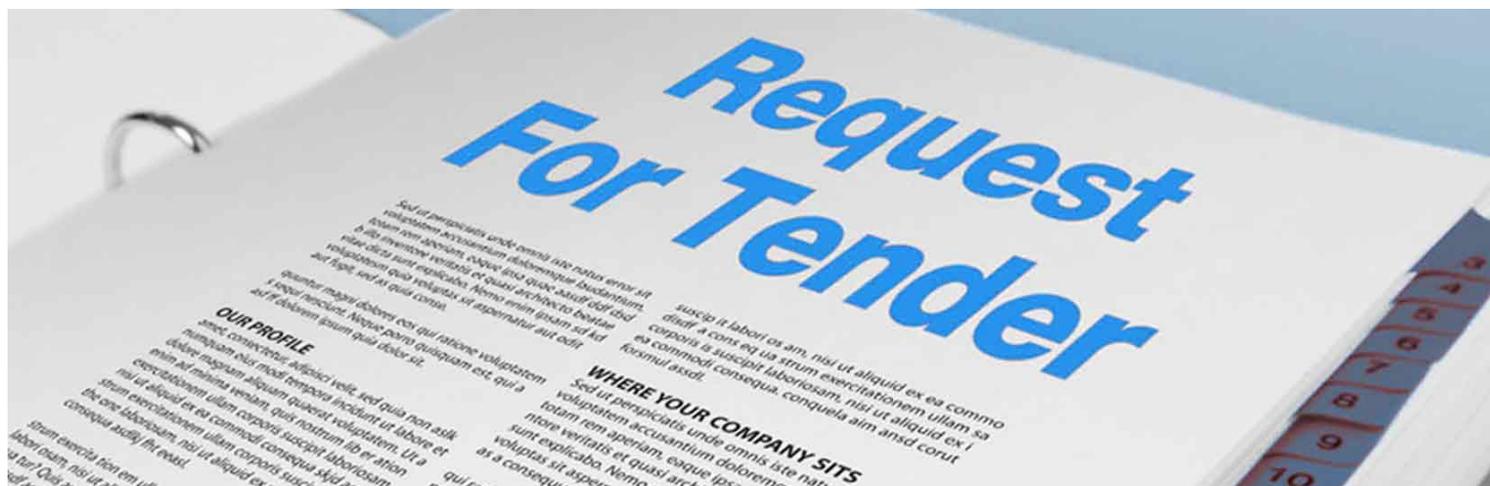**Going out to tender? For best results, make sure you pass the Wendy Test.**

Written by David Daly
Thursday, 19 September 2019 10:31

In my first year working in marketing, I learned a great lesson. We were producing a response coupon or competition entry form of some sort. The copywriters had written it, the art director had designed it, the client had approved it, the studio had set it, and then it came to my boss, Wendy, for approval. She took a pen and tried to fill the form out. And she couldn't. Between us all, we had failed to ask ourselves the simple question - "does it make sense to the people who are meant to complete it?". The answer was, of course, no, and ever since then I have made sure that when I ask a question, or want an action to be carried out, I make explicitly clear what it is.

I've had reason to think of Wendy recently, having spent the last few weeks - days, weekends and nights - helping two BPOs bid for some work. Both of the ITTs came through e-procurement systems, rather than direct from the management team itself. I reviewed the BPOs' input, edited it, corrected it, and wrote sections of the responses. I enjoyed doing it, and was happy that the responses we put together represented the BPOs well.

But I also spent a lot of time just trying to figure out what exactly the ITTs were looking for. Nothing was collated sensibly into one document, and it took a lot of ploughing through to get it into some sort of order. In one case there were lots of unnecessary attachments. In the other case, the ITT referred to attachments that weren't there at all. One of them issued a questionnaire and a separate set of assessment criteria, and I spent a good three or four hours
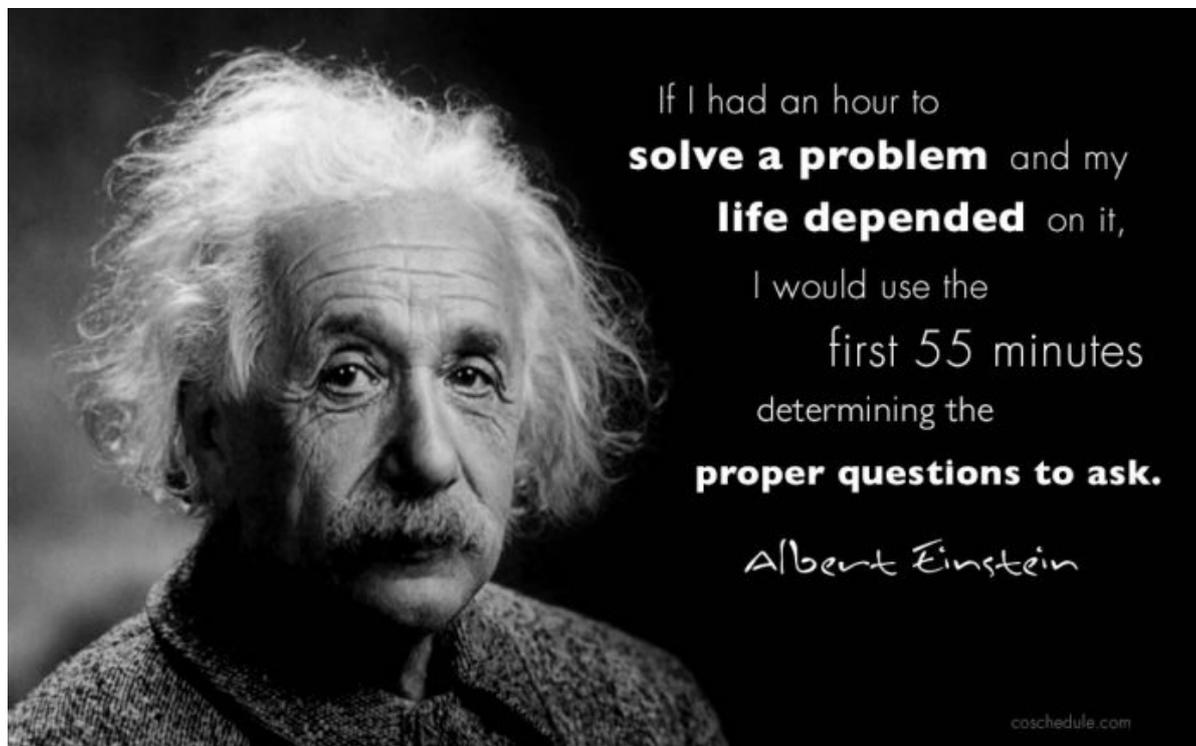
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matching them all up together. Then, when it came to loading the answers onto the system, some of the questions didn't match, and the system wouldn't let us submit the response because we hadn't provided some attachments that we didn't need to. So, in the end, we had to write and attach documents to the effect of "we're only attaching this because we need the system to accept our response".

The other client outdid themselves with their questions. Hundreds of them, and so many of them were almost duplicates of each other. Not exact duplicates, unfortunately, so we couldn't copy over the answers. Each one needed a separate answer for effectively the same question. Many of them were badly written or misspelt. My job was to make sure that the BPO's answers addressed the actual question, but that was often difficult because the questions were so ambiguous, imprecise or just downright incomprehensible. The downside for the prospective client is that they now have to read hundreds of similar answers, which is, I suppose, a small form of comfort!

If I had an hour to **solve a problem** and my **life depended** on it, I would use the first 55 minutes determining the **proper questions to ask.**

Albert Einstein

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The overall impression I get is that these ITTs were collated from a number of different sources within the client organisation, where everyone's views, thoughts and questions were included (no matter how irrelevant or ridiculous some of them are), and no attempt was made to distil them into a clear set of requirements. Then, when all the internal requirements had been gathered, onto the purchasing system it went, and out to the bidders. But no-one at the client seems to have sense-checked the documents, the questions, or indeed the online protocols.

I often work on the other side too - helping companies write tender documentation. I work very hard to make sure that the process is as easy as possible to follow, that information and instructions are clear, that only relevant documentation is included, and that the questions are clear and purposeful. Why? Because I know from experience that the better the ITT, the better the quality of the response, the more precise the solution proposed, and in many cases, the more accurate and favourable the price.

So here's my call to procurement teams. Spend some time refining your ITT, work through it - contents and mechanism - and get it to a stage where you feel it's the best you can do. Then "Wendy-test" it. If it fails, re-work it. If it passes, it's time to issue it.