

Tender readiness checklist

The tender you want will appear in the week you are busiest. This is what to have ready before it does, so the first hour goes on deciding, not searching for a tax certificate.

1. Company documents: current, scanned, in one folder

- Certificate of incorporation or registration.
- Tax clearance certificate, with its expiry date in your calendar.
- Audited financial statements for the last three years (some tenders ask for five).
- Annual turnover by year, in US dollars and local currency, signed off by your accountant.
- Bank reference letter, professional registrations and trade licences.
- Templates for a joint-venture or association agreement and a power of attorney for signatories.

2. Proof of experience

- A one-page sheet for every completed contract: client, country, value, dates, your share, services, and a reference contact.
- Completion certificates and reference letters, scanned. Evaluators score what they can see, not what you remember.

3. People

- Current CVs for every likely key expert, in one consistent format.
- Their degrees and professional registrations, scanned.
- Ask for availability early. Good experts are named on several bids at once.

4. Money and guarantees

- How many days your bank needs to issue a bid security, and what it charges (DeskOS calculator T05 works out guarantee charges).
- Your limit for performance securities, and current day rates for each expert category.

5. Standard text to adapt (never paste blindly)

- Company profile in one page and in three pages.
- Quality assurance; health, safety, environmental and social approach; anti-corruption and conflict-of-interest statements.

6. The first hour after a notice appears

- Read the eligibility and qualification criteria first. If you fail one, stop: no amount of writing fixes it.
- Score it with the free bid / no-bid scorecard.
- Put the submission deadline and the clarification deadline in the calendar.
- Copy every requirement into a compliance matrix, and name one person who owns the bid.

General guidance from DeskOS. Every tender has its own rules, and the documents of the tender you are answering always win.