



# **TLM Level 2 Award in Bid Fundamentals**

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The TLM Level 2 Award in Bid Fundamentals qualification aims to assist individuals across any sector or industry who are seeking to grow their business through bidding, whether already working within a bid role or aspiring to do so, by demonstrating their understanding of the core skills and knowledge to bid successfully. This qualification encompasses the necessary knowledge to enable opportunities to be sourced, written, managed and won!

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The Regulated Qualifications Framework (RQF) was designed by the UK government's Qualifications and Curriculum Development Agency, now replaced by Ofqual. The RQF is referenced to the European Qualifications Framework devised by the European Union

The assessment model for the qualifications presented in this publication was designed by TLM in consultation with Jennifer Lemon and Stuart Morgan, Partners of Customeric Consulting Limited Liability Partnership.

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# 1. For those in a hurry!

- 1.1 TLM's assessment model is common to most of its qualifications. It is based on competence-based assessment of coursework using a portfolio of evidence and supported by a free optional cloud-based evidence management system.
- 1.2 Learners must demonstrate competence against the assessment criteria from their day-to-day work and the tutor assessor must verify that they are competent in relation to the general level descriptor using indicative assessment criteria. TLM's external moderator will check the judgements and the quality of the evidence and provide feedback. This process is not graded, the intention is that it is a flexible way of checking basic practical competence in the subject at the qualification's framework level.

## Procedures

- 1.3 The first thing to do is to arrange assessor training with TLM. TLM trains at least one assessor as Principal Assessor who must accept responsibility for standards within the Centre. The Principal Assessor can train and appoint assessors within the Centre as long as they are competent to take on the work and are willing to sign an agreement on the web site to uphold standards.
- 1.4 TLM will provide initial training in the pedagogical model, and use the supporting technologies to provide the evidence needed. The purpose is to get you started and then we provide on-going support to ensure you are confident and we can work as a professional partnership. We advise new Centres to do some coursework assessment early so that they can receive feedback and quickly become confident in doing routine coursework assessment. Our aim is to make this no more onerous than normal routine assessment that anyone would do as a normal part of the teaching job. This gives more time to focus on teaching and therefore to support raising attainment.

## 2. Introduction

This Level 2 Award in Bid Fundamentals is designed to support professionals working in, or striving to work in, bidding and business development. Throughout this Level 2 Award, the learner will study and demonstrate that they understand how to source bidding opportunities, write responses, manage the process, and submit winning bids. The course will cover the knowledge needed to understand bid fundamentals and best practice, providing learners with a foundation in bid planning, writing and bid management.

The Level 2 Award in will give learners the opportunity to:

- Engage in learning that is relevant to them and which will provide opportunities to develop a range of bid writing and bid management knowledge and techniques, and the personal skills and attributes essential for effective and successful bidding
- Achieve a nationally recognised Level 2 qualification
- Develop their own personal growth and engagement in learning.

### 2.1 TLM Level 2 Award in Bid Fundamentals

The objective of the qualification is to provide learners with the knowledge and confidence to develop their own skills. This qualification includes optional units, and learners are required to complete a total of 4 credits in order to earn the qualification.

#### Optional Units

- Unit 1 – Bid Basics (2 credits)
- Unit 2 – Introduction to Bidding Skills (2 credits)
- Unit 3 - Strategic Market Positioning for Business Growth (4 credits).

# 3. Summary of Qualification Specification

## 3.1 Level 2 Award (Annexe A)

The Level 2 Award in Bid Fundamentals is designed to support professionals working in, or striving to work in, bidding and business development. Throughout this Level 2 Award, the learner will study and demonstrate that they understand how to source, write, manage, and submit winning bids. The course will cover the knowledge needed to understand bid fundamentals and best practice, providing learners with a foundation in bid writing and bid management skills

**Qualification Title:** TLM Level 2 Award in Bid Fundamentals

**Qualification Number:** 610/5116/0

**Qualification Level:** Level 2

**Total Credits:** 4

**Guided Learning Hours:** 30

**Total Qualification Time:** 40

**Assessment Methods:** Coursework, E-assessment, Portfolio of Evidence

### Assessment

Learners must demonstrate competence against the assessment criteria from their communication and involvement with the training materials and the trainer assessor must verify that they are competent in relation to the general level descriptor using indicative assessment criteria. TLM's external moderator will check the judgements and the quality of the evidence and provide feedback. This process is not graded, the intention is that it is a flexible way of checking basic practical competence in the subject at the qualification's framework level.

- Unit 1: Bid Basics (2 credits)
- Unit 2: Introduction to Bidding Skills (2 credits)
- Unit 3: Strategic Market Positioning for Business Growth (4 credits).

## 3.5 Assessment

The internally assessed, externally moderated coursework for all qualifications is pass/fail but by submitting the evidence for external moderation, feedback can be given to the tutor on areas to improve for resubmission.

Evidence must be provided against the unit assessment criteria from practical tasks related to the learners' everyday work supported by tutor observations, portfolio completed, and or activities in line with the learning materials


The way evidence is gathered is up to the assessor, the only requirement is that it clearly supports the judgements against the assessment criteria and the relevant learning outcomes.

If on formative assessment the account manager finds gaps in evidence relating to a particular candidate, they will request more evidence before approving the award or the unit certificate. Assessors must then adjust their work to ensure all their learners are providing the appropriate level and breadth of evidence.

We encourage early submission of at least some evidence so that assessors are confident from the feedback that what they are providing is sufficient. In this way we can maintain standards while supporting improved efficiency.

Centres will be subject to the TLM Centre Assessment Standards Scrutiny (CASS) and further details of this, including our centre guidance, is freely available on the TLM website in our Policy Download Centre. <https://tlm.org.uk/policy-download-centre/>

## 4. Qualification Content

Mandatory	Optional Unit Bank
None	
	<ul style="list-style-type: none"><li>• Unit 1: Bid Basics (2 credits)</li><li>• Unit 2: Introduction to Bidding Skills (2 credits)</li><li>• Unit 3: Strategic Market Positioning for Business Growth (4 credits)</li></ul>

## 5. Support

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### Guidance and Assistance

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- 5.1** There is further guidance for coursework assessment on the TLM web site. All centres have an assigned Account Manager who will be pleased to help at any time. Our aim is to give professional assessors, most of whom are qualified tutors, the confidence to make judgements with a minimum of bureaucracy so that they can focus their time on maintaining their professional knowledge, skills and supporting learning through effective teaching rather than “chasing paper”. There is often a confusion between bureaucracy and rigour, since unnecessarily complex bureaucracy can actually detract from rigour by obscuring the importance of the outcomes.
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- 5.2** **Web sites** - TLM provides support through cloud-based systems. Providing assessment grades and the management of certification through the Markbook Site is mandatory and all assessors are provided with training in its use. It is simply a matter of recording learner competence against the unit criteria as the evidence is collected and claiming a certificate on behalf of the learner when a unit has been fully assessed.
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- 5.3** The **community learning site** provides free optional facilities for learners to submit their evidence on-line, linking it to the assessment criteria across single or multiple units. The assessor can accept or reject this evidence and comment on it providing a full audit trail for evidence. Moderators/verifiers can get immediate access to this evidence and so it is potentially a lot more efficient than alternative methods. No paper, no emails with file attachments necessary. There are facilities for progress tracking that can be based on criteria and/or units. The system can be linked as an extension to any standards compliant VLE/e-portfolio system for centres that are already committed to a specific VLE product. Training can be provided, and free support is available from your Account Manager. The aim is to eliminate all paper-based bureaucracy, all screen-shots and referencing that draws time away from teaching.
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- 5.4** **Telephone** and email support are available to all Centres. There is a general convention of `firstname.secondname@tlm.org.uk` for email addresses. It is usually best to email your account manager in the first instance. Google hangouts can be arranged for video conferencing support.
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## 6. Registration & Procedures

### Registration

- 6.1** TLM's registration model allows centres to enter learners at times convenient to them. There are no late entry fees and no additional fees should a learner fail to produce evidence at a level but can meet the criteria at a lower level. This can reduce costs to the centres when compared to other qualifications

There are no fees for replacement certificates or verification of certificates because all certificates can be directly authenticated against TLM's secure database. For details of current subscription costs please contact us or refer to the web site.

### Internal standardisation

- 6.2** The Principal Assessor has the ultimate responsibility for consistency in assessment standards within a centre. All assessors have signed a contract agreeing to uphold standards and should therefore co-operate with the Principal Assessor and Account Manager at TLM to ensure that standards across the centre are consistent.

It is advisable to send work samples to TLM early to check that evidence is at the right standard so that there is time to make any adjustments necessary to the course and learner expectations.

TLM will generally check a higher quantity of work from new assessors and feedback to ensure that they are confident to make appropriate judgements over time. This reduces risk and improves efficiency in the longer term.

### Authentication

- 6.3** All assessors must take reasonable steps to ensure that any coursework evidence submitted by candidates is a true reflection of the candidates' competence. This is in keeping with the assessor undertaking to uphold and maintain standards in the contract with TLM.
- 6.4** Certificates can be authenticated directly on-line using the certificate number or by scanning the QR code on the certificate. There is no charge and it makes it more likely that certificates will be checked and that in turn improves security. Certificate forgeries are a significant problem when authentication is not simple and straightforward because convincing forgeries are easy to achieve with recent technologies and will get easier as time goes on.

# 7. Other Considerations

## Access arrangements and special requirements

- 7.1 All TLM's qualifications are intended to be accessible, as widely as possible.

Please refer to the Annex for further information.

Centres should contact TLM if they have any questions related to accessibility issues

## Language

- 7.2 The language for provision of this qualification is English only. This will only change if we have a significant demand in another language that is sufficient to cover the additional costs involved.

## Malpractice

- 7.3 TLM has comprehensive policies and procedures for dealing with malpractice. These are documented with links on the web site at <https://tlm.org.uk/policy-download-centre/> Assessors should be familiar with these policies and make them clear to candidates. Assessors should inform their account manager if they suspect any instance of malpractice that could have a material effect on the outcome of any assessments, either for themselves or colleagues. This is part of the upholding of standards that is part of the contract with TLM.

## Equality of opportunity

- 7.4 TLM promotes equality of opportunity through policies and procedures. These are again documented in detail on the web site at <https://tlm.org.uk/policy-download-centre/>

## Resources, Support and Training

- 7.5 A clear goal is to enable learners to support all their IT user needs using resources freely and legally available from the internet. This is related directly to national policies for inclusion and equality of opportunity. The reality is that there is so much user dependence on proprietary applications that we can only support the transition to free and open resources through education and common sense.
- 7.6 TLM does not require centres to use Free and Open-Source applications but it certainly encourages them to do so. Most of the key software applications needed to support any of the assessed units are available freely from the web including office suites, graphics and sound editing. As a nation we could save hundreds of millions if not billions of pounds in software licensing fees by providing users with the skills, knowledge and confidence to migrate to free and open-source applications. YouTube, OpenClipart.org, Wikipedia and many other sites provide free content that supports learning and the number and range of such sites is increasing.

## Annexe A

### Level 2 Award in Bid Fundamentals - Unit assessment - coursework guidance

The Level 2 learner reflects the ability to select and use relevant knowledge, ideas, skills and procedures to complete well-defined tasks and address straight-forward problems. It includes taking responsibility for completing tasks and procedures and exercising autonomy and judgement subject to overall direction or guidance. AND/OR Holder can select and use relevant cognitive and practical skills to complete well-defined, generally routine tasks and address straightforward problems. Holder can identify how effective actions have been. Holder can identify, gather and use relevant information to inform actions.

**Moderation/verification:** The assessor should keep a record of assessment judgements made for each candidate and make notes of any significant issues for any candidate. They must be prepared to enter into dialogue with their Account Manager and provide their assessment records to the Account Manager through the on-line mark book. They should be prepared to provide evidence as a basis for their judgements should it be required by the Principal Assessor or their Account Manager/external moderator. Before authorising certification, the Account Manager must be satisfied that the assessor's judgements are sound.

#### General Information

The Level 2 qualification has the following characteristics for learners:

- Achievement at RQF level 2 (EQF Level 3) reflects the ability to select and use relevant knowledge, ideas, skills and procedures to complete well-defined tasks. It includes.
  - Taking responsibility for completing tasks and procedures and exercising autonomy and judgement subject to overall direction or guidance.
  - Using understanding of facts, procedures and ideas to complete well-defined tasks and address straightforward problems.
  - Interpreting relevant information and ideas.
  - Taking responsibility for completing tasks and procedures subject to direction or guidance as needed.
- The specification for the Level 2 award provides an outcome framework for assessment and is not intended to dictate any particular context for learning and so can be used with any age range of adults

#### Requirements

- Standards must be confirmed by a trained Level 3 Assessor
- Assessors must as a minimum record assessment judgement as entries in the on-line mark book on the TLM certification site.
- It is expected that there will be routine evidence of work used for judging assessment outcomes in the candidates' records of their day-to-day work. Samples, including related plans and schemes of work should be available at the annual visit and/or by video conference.
- Different approaches to learning will be required in order to match differing needs, for example, the needs of learners will be different from the needs of those with learning disabilities.
- When the candidate demonstrates secure capability against each of the criteria in the unit, they are entitled to a certificate for passing the unit and the overall award.
- We expect at least 18 hours of guided study to be under-taken for the award for complete beginners generally new to formal education, but discretion can be used to take account of prior learning where this is sensible in individual cases. In terms of making the certificate, what matters is outcomes. Can the candidate securely meet the criteria?

## **Level 2, Unit 1 – Bid Basics**

<b>1. Understand the Bid Process</b>	<b>2. Understand Private vs Public Sector Bidding</b>	<b>3. Understand Sourcing Opportunities</b>
1.1 I can identify bidding and explain its importance in business development and growth.	2.1 I understand and can detail the main differences between public and private sector bidding.	3.1 I can describe various bid sources, explain different portal formats, and understand CPV (Common Procurement Vocabulary) codes.
1.2 I can describe the standard stages of a public and private sector procurement using standard bid terminology.	2.2 I can provide examples of customer types and bid values which would need to go out to tender.	3.2 I can demonstrate the ability to use procurement portals, set up Tender Alerts, and conduct searches based on keywords and CPV codes.
1.3 I can summarise different types of bids, and the types of client/situations when they might be used.	2.3 I understand and can outline the key principles of public sector procurement in the UK and how these should be considered when bidding.	3.3 I can describe the types of bid documentation and forms which might comprise a standard tender pack.
1.4 I can describe a standard bid response process cycle.	2.4 I can compare and explain the pros and cons of private and public sector tendering.	3.4 I can identify techniques for reporting project progress to stakeholders and senior management, adapting communication strategies based on stakeholder needs.
1.5 I can describe the basics of how to bid and features of a good quality vs poor quality bid response.	2.5 I can understand social value and why it is an important part of public sector bidding.	3.5 I can understand and apply bid qualification criteria to support bid or no-bid decisions based on the evaluation of selected and relevant information.

## Level 2, Unit 2 – Introduction to Bidding Skills

1. Understand the 'Planning to Succeed' and 'Bid Toolkit' Methodologies	2. Understand Successful Bid Management	3. Understand Successful Bid Writing
1.1 I understand the basics of bidding, including the necessary skills in bid planning, management, and writing.	2.1 I can describe the distinct challenges of bid project management and the Bid Manager's role, and how to track progress against deadlines.	3.1 I can describe how to write effective bids by following a structured approach and collaborating with SMEs.
1.2 I can describe the significance of bid planning and strategy in successful bidding, and can distinguish various types of bid planning activities.	2.2 I can identify the key roles and responsibilities within a bid team and their tasks to deliver a successful bid.	3.2 can analyse a bid question and ensure the response covers all elements of the question.
1.3 I understand what bid qualification is and can apply this knowledge before investing in bidding an opportunity.	2.3 I understand the key steps in the bid process and can assist in creating a Bid Plan.	3.3 I can create a storyboard and write a clear, compliant response to standard bid questions with supporting evidence.
1.4 I can describe why assembling a bid team with the right roles, skills and experience is essential to delivering a high-quality bid.	2.4 I understand why Kick Off and Lessons Learned meetings are crucial in bid management.	3.4 I can review draft bid responses, identifying areas for improvement from an evaluator's perspective.
1.5 I can identify the purposes and uses of Bid Toolkit templates for successful bid delivery.	2.5 I understand the importance of submitting a compliant, on-time, and buyer-specification-compliant bid.	3.5 I understand that confidentiality rules apply in public sector procurement, with limited exceptions.
1.6 I can describe the risks of non-compliant, low-quality, or late bids and know how to plan, manage, and mitigate them.	2.6 I can demonstrate how to find and share bid management best practices, stay updated, and seek advice.	3.5 I understand that bid format and design matter for effective messaging, but must align with buyer's instructions.

## Level 2, Unit 3 – Strategic Market Positioning for Business Growth

1. Identify key features that distinguish your business in the market	2. Outline a basic sales strategy aimed at specific customer groups	3. Creating a Go-To-Market Plan
1.1 I can describe the action steps and process to develop a Market Proposition.	2.1 I can describe the importance of developing a sales strategy which is aligned to and 'targeted' to sell the Market Proposition.	3.1 I can describe how to develop a Go-To-Market Plan for successful product launches.
1.2 can describe how Vision, Mission, and Values statements relate to market propositions.	2.2 I can describe my organisation's Market Proposition.	3.2 I can understand customer personas, journeys, and value matrices for buyer insight.
1.3 I can identify how to use SWOT analysis to assess strengths, weaknesses, opportunities, and threats for my business.	2.3 I can identify how to turn Market Proposition key points into winning sales messages.	3.3 I can describe the essential activities for a Go-To-Market Plan.
1.4 I know how to assess and evaluate my business and customers' needs using various techniques.	2.4 I can identify an operational model and can create an 'As Is' to 'To Be' flowchart.	3.4 I can develop a basic Go-To-Market plan with key tasks and timelines.
1.5 I can describe what my products/ services are and what is meant by 'As Is' and 'To Be' products/ services.	2.5 I can identify how to set achievable sales goals and track progress.	3.5 I understand the value of pilot campaigns and how to improve them.
1.6 I can describe how to develop a Market Proposition using tools and techniques.	2.6 I can identify technologies used to manage sales processes, including pipeline tracking and contact organisation.	3.6 I can describe how to measure marketing campaign effectiveness using key metrics.

# Teacher Guidance Notes

## **Level 2, Unit 1 – Bid Basics**

### **1 - Understand the Bid Process**

#### **1.1: I can identify bidding and explain its importance in business development and growth.**

- Introduce the topic of bidding; explain the difference between a bid and a tender.
- Explain why bidding is important for both suppliers and buyers – for business growth and for delivering services.
- Highlight and discuss why bidding is important for both small and large organisations.
- Provide examples of bidding in various contexts and encourage students to share any experiences of bidding they may have.

#### **1.2: I can describe the standard stages of a public and private sector procurement using standard bid terminology.**

- Introduce the key differences between public and private sector procurement.
- Explain the main stages and standard timelines of a public / private procurement including standard terminology and what the role of a bid professional might be at each stage of the process e.g., SQ/PQQ stage, ITT, ITS etc.
- Provide examples of bidding in both the public and private sector and encourage students to share their experiences.

#### **1.3: I can summarise different types of bids, and the types of client/situations when they might be used.**

- Introduce different types of bid.
- Give examples of the types of client who may use different types of bid and why.
- Illustrate and discuss the pros and cons of different types of bid.
- Provide examples of bidding different types of bid and encourage students to share any experiences of each type of bidding they may have.

#### **1.4 I can describe a standard bid response process cycle.**

- Provide an overview of the standard bid process (e.g., high level overview of a bid cycle).
- Encourage students to feed back on the process and why it might be structured in this way.
- Provide information on the risks of not having an effective bid process.
- Encourage students to discuss their own experiences (if any) of bidding with or without a process and the impacts.

#### **1.5: I can describe the basics of how to bid and features of a good quality vs poor quality bid response.**

- Describe the basics of how to bid – reflecting upon the standard bid response cycle.
- Provide a summary of the skills needed to bid (e.g., writing, commercial, management, design).
- Describe the features of a good quality/poor quality response (e.g., answering each question fully, addressing the client's specified requirements).
- Provide real-life examples of good quality or poor-quality bids and discuss their features.
- Encourage students to discuss any real-life examples they may have where bids have scored highly or poorly, and the lessons learned.

### **2 – Understand Private vs Public Sector Bidding**

### **2.1 I understand and can detail the main differences between public and private sector bidding.**

- Provide a recap on Module 1 and explain the differences between public and private sector bidding.
- Explain the process for bidding into either sector and the implications for the bidder/bid professional.
- Encourage students to discuss terminology and how it relates to private vs public sector bidding.
- Provide examples of bidding in both the public and private sector and encourage students to share any experiences of each type of bidding they may have.

### **2.2 I can provide examples of customer types and bid values which would need to go out to tender.**

- Explain which types of clients and customers deploy public sector procurement and why.
- Provide details of the value of bids which must go out to tender.
- Discuss the benefits of tendering through public sector procurement.
- Discuss the benefits of tendering through private sector procurement.
- Conduct practical exercise to provide students with greater understanding of customers and bid values which go out to public sector tender.

### **2.3 I understand and can outline the key principles of public sector procurement in the UK and how these should be considered when bidding.**

- Introduce the UK public sector's Procurement Act 2023.
- Explore what this Act means for bidding and bid professionals.
- Highlight how bid professionals need to factor this into bidding.
- Provide examples of best practice in relation to meeting Procurement Act regulations.

### **2.4 I can compare and explain the pros and cons of private and public sector tendering.**

- Provide and discuss the pros and cons of private sector bidding for client and bidder.
- Provide and discuss the pros and cons of public sector bidding for client and bidder.
- Highlight how bid professionals need to factor this into bidding.
- Discuss any examples/experience of bidding into public or private sectors – any best practice/lessons learned.

### **2.5 I can understand social value and why it is an important part of public sector bidding.**

- Explain what social value is and introduce The Social Value Model and The Social Value Act 2012.
- Explain the importance of social value when bidding into the public sector.
- Explain the various social value themes and policy outcomes.
- Encourage students to discuss types of social value proposal examples that could be relevant to their own organisations.
- Outline a typical social value commitment and the associated supporting plan.

## **3 – Understand Sourcing Opportunities**



**3.1 I can describe various bid sources, explain different portal formats, and understand CPV (Common Procurement Vocabulary) codes.**

- Describe the different ways in which an organisation can source bid opportunities.
- Describe what a procurement portal is, how they work, styles and format – including do's and don'ts.
- Outline what CPV codes are.
- Discuss any examples/experience of using portals/student observations, any lessons learned.

**3.2 I can demonstrate the ability to use procurement portals, set up Tender Alerts, and conduct searches based on keywords and CPV codes.**

- Describe the different well-known procurement portals.
- Demonstrate use of a procurement portal/set up of alert.
- Conduct searches based on keywords and CPV codes.
- Discuss any examples/experience of using procurement portals.

**3.3 I can describe the types of bid documentation and forms which might comprise a standard tender pack.**

- Describe the bid documentation and forms which generally form a tender pack.
- Share a tender pack for review and discussion.

**3.4 I can identify techniques for reporting project progress to stakeholders and senior management, adapting communication strategies based on stakeholder needs.**

- Explain why it is important to qualify an opportunity.
- Explain the factors to consider when qualifying.
- Common qualification techniques and tools including evaluation and scoring methods.
- Provide an example qualification form for review and discussion.

**3.5 I can understand and apply bid qualification criteria to support bid or no-bid decisions based on the evaluation of selected and relevant information.**

- Explain why bid planning is important.
- Explain the types of activity that might be involved in bid planning (e.g., prior engagement/relationship building with client, research, collateral building, response planning, competitor analysis, bid resource planning).
- Pre-bid pipeline identification and tracking.

## **Level 2, Unit 2 – Introduction to Bidding Skills**

### **1 - Understand the 'Planning to Succeed' and 'Bid Toolkit' Methodologies**

#### **1.1 I understand the basics of bidding, including the necessary skills in bid planning, management, and writing.**

- Recap of Unit 1.
- Recap of what bidding is.
- Describe the different skill sets needed to bid effectively.
- Explain the difference between bid management and bid writing.
- Outline the responsibilities of a bid manager.
- Outline the responsibilities of a bid writer.
- Encourage students to consider types of activity that would be undertaken by bid manager/bid writer.
- Encourage students to discuss/role play roles of bid manager/bid writer.

#### **1.2 I can describe the significance of bid planning and strategy in successful bidding, and can distinguish various types of bid planning activities.**

- Recap and expand upon the introduction to bid planning covered in Unit 1.
- Explain that bid planning should take place well before the bid has been released (e.g., dialogue, research, competitor analysis, relationship building).
- Explain what bid strategy is, the factors to consider and how to ensure the bid response reflects this bid strategy (e.g., win themes, price, solution).
- Encourage students to discuss bid planning and strategy.

#### **1.3 I understand what bid qualification is and can apply this knowledge before investing in bidding an opportunity.**

- Recap and expand upon introduction to bid qualification covered in Unit 1.
- Review an example of a bid qualification form/checklist/ scoring mechanism.
- Encourage students to discuss and share their own experiences of bid qualification.
- Encourage students to conduct a mock bid qualification exercise and report their decision to bid or no bid to the group.

#### **1.4 I can describe why assembling a bid team with the right roles, skills and experience is essential to delivering a high-quality bid.**

- Ask students to consider the types of role/skills that might be required within a successful bid team through group discussion (bid project management, bid writing, solution development, administration, relationship/stakeholder management, commercial, financial, legal, design).
- Provide a best practice example of a bid team structure.
- Explain the roles and responsibilities of each role and why each role is important to bid success.
- Discuss the factors which may impact the nature of the bid team (size/duration of opportunity, technical nature will require SME input, re-bid).
- Highlight the importance of time management and attention to detail within the role of bid manager.
- Encourage students to discuss the concept of a bid team – which role they would wish to take and why and how they would work with the other roles to ensure bid success.

### **1.5 I can identify the purposes and uses of Bid Toolkit templates for successful bid delivery.**

- Introduce the Bid Toolkit and standard templates – and explain how these can be accessed as part of the course resources.
- Discuss each template at a high level and explain its purpose.
- Encourage students to discuss each template and the benefits of using it within the bid management process.
- Encourage students to discuss the pitfalls of not using standard templates and processes to manage a bid.
- Collate student ideas and provide worked-examples of each template – including a SWOT/competitor analysis exercise.
- Encourage students to work through each template using a live example from their own business or a ‘mock’ example.

### **1.6 I can describe the risks of non-compliant, low-quality, or late bids and know how to plan, manage, and mitigate them.**

- Introduce and explain the common risks encountered within bidding.
- Apply these risks to an example bid and illustrate the issues they could cause.
- Explain the measures / methods to mitigate against each potential risk.
- Highlight the impact these risks pose on the bid process / ability to submit a compliant, winning, timely bid response.
- Conduct practical exercise, encouraging students to identify risks, issues, and mitigations for a different ‘real world’ project example bid.
- Encourage students to discuss how bid planning and effective bid management can prevent risks to compliance, quality and/or timely submission.

## **2 – Understand Successful Bid Management**

### **2.1 I can describe the distinct challenges of bid project management and the Bid Manager’s role, and how to track progress against deadlines.**

- Introduce and explain the similarities and differences between managing a bid and other types of project management.
- Describe the activities and actions involved in successful bid management e.g., internal governance process, checkpoints and review.
- Describe the relationship between the Bid Manager and other bid team roles, e.g., Bid Writer; Bid Commercial.
- Highlight the importance of time management and attention to detail within the role of Bid Manager.
- Summarise the contents of the Bid Toolkit to support effective Bid Management.
- Encourage students to discuss their own experiences of bid or project management.

### **2.2 I can identify the key roles and responsibilities within a bid team and their tasks to deliver a successful bid.**

- Recap and expand upon bid roles and responsibilities covered in Module 1 regarding the different types of bid role within a bid team.
- Recap the tasks and responsibilities undertaken by different roles on a bid team.
- Explore the potential risks of not having the correct resources/skills within a bid team.
- Discuss the bid variables which may impact which roles might be needed on a particular bid.
- Conduct a practical exercise to allocate bid tasks to the most appropriate bid role.

### **2.3 I understand the key steps in the bid process and can assist in creating a Bid Plan.**

- Summarise the key stages and milestones within a buyer’s bid process (particularly public sector).
- Describe the key stages, activities, and roles and responsibilities within an effective Bid Plan.
- Summarise the contents of the Bid Toolkit to support effective Bid Management.
- Highlight the importance of time management and attention to detail within the role of bid manager.
- Encourage students to practise creation of a high-level Bid Plan timeline using key stages, activities, roles, responsibilities and bidding terms.

#### **2.4 I understand why Kick Off and Lessons Learned meetings are crucial in bid management.**

- Introduce the Bid Kick Off Meeting.
- Summarise the purpose and agenda items to be covered in a Bid Kick Off Meeting.
- Summarise the likely outputs of the Bid Kick Off Meeting and why these are important to the overall bid management (agreement of timelines and response allocation, housekeeping, flagging any holidays/absence).
- Identify which templates within the Bid Toolkit could be used to support the Bid Kick Off.
- Introduce the Bid Lessons Learned Meeting.
- Summarise the purpose and agenda items to be covered within a Bid Lessons Learned Meeting.
- Summarise the likely outputs of the Bid Lessons Learned Meeting and why these are important (e.g., continuous improvement).
- Identify which templates within the Bid Toolkit could be used to support the Bid Lessons Learned.
- Practical exercise where students develop their own example Bid Kick Off / Lessons Learned meeting agendas and practise leading/facilitating the sessions.

#### **2.5 I understand the importance of submitting a compliant, on-time, and buyer-specification-compliant bid.**

- Discuss the submission process and the potential risk of not submitting on time and in line with the buyer's instructions.
- Explain that most buyers request bid response documents to follow a specific naming convention.
- Explain that bid submission used to include production of hard copy documentation, but most bids now require either email or procurement portal submission. Point out that some portals require upload of response documents, some require cut and paste into boxes within the portal. Advise students to check the portal format and requirements well ahead of submission as sometimes there are additional requirements on the portal which are not always mentioned with the tender documents.
- Explain that there is normally qualification documentation to add or upload (e.g., accounts, insurance) as well as answers to technical questions and pricing. It is therefore important to be well organised, have files labelled correctly and leave sufficient time for uploading.
- State that it is important to ensure that once you have uploaded you click the submission button and receive confirmation of submission.

#### **2.6 I can demonstrate how to find and share bid management best practices, stay updated, and seek advice.**

- Introduce and explain the best practice for bid management – including known processes (e.g., Shipley), accreditation (e.g., APMP) and new innovations e.g., AI technology.
- Illustrate and discuss the methods for keeping up to date with bidding news / topics / industry updates.
- Demonstrate how students can collaborate with bid professionals to gain greater understanding of where to go for advice / hints / tips.

### **3 – Understanding Successful Bid Writing**

#### **3.1 I can describe how to write effective bids by following a structured approach and collaborating with SMEs.**

- Explain what bid writing is and how it is different from other document writing.
- Show examples and describe the types and format of information generally required at each stage of a bid.
- Describe the differences between bid writing private sector proposals vs public sector bid responses.
- Explain why response structure is important.
- Explain why response language (no jargon) and reiterating client language and phraseology is important.
- Describe a structured approach to developing bid content (understanding bid strategy and win themes, storyboarding, working with SMEs, research, collateral, historical bids, AI, own knowledge, technical review and proofing).

#### **3.2 I can analyse a bid question and ensure the response covers all elements of the question.**

- Describe how to analyse a bid question and why it is important to ensure all parts of the question are answered.
- Describe other considerations to be taken into account when bid writing (e.g., organisational values, needs of the buyer, requirements and evaluation criteria, response structure and format (including word or page count), public or private tender, use of style and language, compliance, diagrams needed/allowed, proofing and editing, time management, ensuring proposals are supported by the operation/affordable/legal/accounted for within the bid commercials).
- Emphasise the need for positive language, alignment to the buyer's words/style, clear explanations avoiding jargon, description of acronyms, accurate punctuation, spelling and grammar, proof points to evidence proposals/track record, less talking about you as the supplier and more about the buyer's needs.
- Emphasise the need for benefits to be clearly set out – the 'so what?' test.

#### **3.3 I can create a storyboard and write a clear, compliant response to standard bid questions with supporting evidence.**

- Describe what a storyboard is and how it is useful for bid writing.
- Provide an example of a storyboard.
- Explain how a storyboarding session might work and the benefits of running this session at the outset of the bid – before the bid writing commences.
- Students to be given an exercise using their own or a fictional business to create a storyboard example, working collaboratively if possible.

#### **3.4 I can review draft bid responses, identifying areas for improvement from an evaluator's perspective.**

- Discuss how a bid is scored using evaluation criteria.
- Ensure any specific weightings and page/ word counts are used to reflect the importance of the question and its subcomponents.
- Discuss the job of the bid evaluator and how we can make their job easier by writing clear, concise responses, free from jargon.
- Discuss how a bid outcome could also be unconsciously influenced by prior relationships/team/trust/procurement team.
- Reiterate what good looks like in a bid response – using question and answer techniques with students to bolster learning.
- Provide an example of a good bid response and a poor bid response and an example set of evaluation criteria and ask students to explain whether they feel it is a good/poor response and why.
- Encourage students to jointly discuss the bid responses and the evaluation criteria and agree on a mock score for each response.
- Advise the students of the actual scores the example responses received.

#### **3.5 I understand that confidentiality rules apply in public sector procurement, with limited exceptions.**

- Discuss why buyer/seller engagement is forbidden/discouraged during live procurement.
- Explain the bid Clarification Question Process and the format it normally takes within a procurement portal.

- Raise the importance of reviewing the Clarification Question window to ask any questions required about the bid.
- Raise the importance of reviewing the Clarification Question responses as they may fundamentally alter information provided previously within the tender documentation.

**3.6 I understand that bid format and design matter for effective messaging, but must align with buyer's instructions.**

- Explain likely differences between private and public procurement in terms of response format required.
- Explain the potential risks of not complying with the buyer's instructions.
- Explain how diagrams, if allowed, should be consistent in format and colour palette, labelled and readable in the font size required. Note whether words in a diagram are included in the bid response word count.
- Discuss the look and feel of a document in terms of helping the evaluator score your bid.

## **Level 2, Unit 3 – Strategic Market Positioning for Business Growth**

### **1 - Identify key features that distinguish your business in the market**

#### **1.1 I can describe the action steps and process to develop a Market Proposition.**

- Introduction to the term Market Proposition.
- Introduce the components that make up an effective market proposition.
- Explain the various components of a Market Proposition; research, analysis, design, solutions/products/services.
- Highlight how this informs sales and marketing strategy and go-to-market plan.
- Provide and ask students to discuss examples of best practice from reputable / known brands.

#### **1.2 I can describe how Vision, Mission, and Values statements relate to market propositions.**

- Introduce and explain what a vision/ Mission Statement is.
- Highlight the importance of defining a business Vision/ Mission Statement and how this informs bid messaging and win themes.
- Provide examples of best practice.
- Encourage students to discuss and provide further examples of Vision/ Mission Statements from reputable / known brands.
- Ask students to explore their organisational collateral on Vision, Mission, values, goals and objectives and how to support their development/ refinement and make suggestions for improvement.

#### **1.3 I can identify how to use SWOT analysis to assess strengths, weaknesses, opportunities, and threats for my business.**

- Highlight the purpose of carrying out SWOT analysis.
- Discuss how conducting a SWOT can help us to understand our organisation's competitors, the market, and to help produce a market proposition of differentiated products/ services and their benefits.
- Conduct a guided, practical exercise with students to assess an example organisation's SWOT and then task students to produce their own organisational SWOT.
- Encourage students to discuss and analyse the practical exercise examples.

#### **1.4 I know how to assess and evaluate my business and customers' needs using various techniques.**

- Introduce and explain how evaluation tools and techniques (e.g., SPIN, MOSCOW) can help us to gain insight on our organisation and potential customer needs.
- Explain why understanding this will drive success into chosen target markets.
- Highlight how this can inform bid professionals' decisions and bid messaging.
- Highlight the importance of stakeholder engagement, across all necessary levels of the business, to ensure alignment to business objectives / targets.
- Encourage students to use the tools and techniques with evidenced outcomes for their respective organisation.

#### **1.5 I can describe what my products/ services are and what is meant by 'As Is' and 'To Be' products/services.**

- Explain the terms 'as-is' and 'to-be' and ask students to explore their products/services using this terminology.
- Ask students to list their 'as-is' and proposed 'to-be' products/services either verbally or in writing.

#### **1.6 I can describe how to develop a Market Proposition using tools and techniques.**

- Ask students to articulate their services/products and USPs – either verbally or in writing.
- Discuss the steps needed to take their organisation from ‘as-is’ to ‘to-be’ highlighting any changes/work needed.

## **2 - Outline a basic sales strategy aimed at specific customer groups**

### **2.1 I can describe the importance of developing a sales strategy which is aligned to and ‘targeted’ to sell the Market Proposition.**

- Provide a recap on Module 1
- Introduce the idea of a ‘Market Test’ to explore interest in the market proposition.
- Use matrix tables to show how the products and services are aligned to their respective target markets.
- Ask students to produce a Matrix Table relevant to their organisation.

### **2.2 I can describe my organisation’s Market Proposition.**

- Outline the key components of a sales and marketing strategy and how it relates to bidding.
- Highlight the importance of consistent messaging, tailored to channels, market sectors and their audience.
- Explore available sales and marketing channels.
- Guide students through the production of a high-level Market Proposition ‘on a page’.

### **2.3 I can identify how to turn Market Proposition key points into winning sales messages.**

- Jointly assess how to collate and share product/ service differentiators.
- Discuss how targeted sales themes can be converted into messaging as a consistent ‘thread’.
- Guide students in the development of differentiated messaging for their own organisation.

### **2.4 I can identify an operational model and can create an ‘As Is’ to ‘To Be’ flowchart.**

- Introduce and illustrate the format of a TOM.
- Describe how TOMs support an organisation’s sales and marketing strategy.
- Guide students to produce a high level ‘as is’ and ‘to be’ TOM.

### **2.5 I can identify how to set achievable sales goals and track progress.**

- Discuss terms: Market, Product, Revenue.
- Discuss elements/stakeholders who may influence sales targets and metrics within an organisation.
- Encourage students to develop an example Sales Target/Metrics related to their own or a fictional organisation.

### **2.6 I can identify technologies used to manage sales processes, including pipeline tracking and contact organisation.**

- Discuss why data capture, data maintenance and recording is important to sales and bidding.
- Explore a variety of best practice tools.
- Explain the importance of reporting and communication to drive improvements and change.

## **3 - Creating a Go-To-Market Plan**



### **3.1 I can describe how to develop a Go-To-Market Plan for successful product launches.**

- Provide a recap on Module 2
- Looking at the importance of targeted marketing and how it can create buying behaviours bringing the market proposition 'to life'.
- Creating awareness of the matrix complexity of targeted buyers with different buying behaviours, different media to reach the target audience, tailoring the messages by sector and media channel.
- Encourage students to discuss generally what they feel are successful marketing approaches and how it has influenced them.

### **3.2 I can understand customer personas, journeys, and value matrices for buyer insight.**

- Introduce and explain the various marketing terms and concepts.
- Explain the difference between 'as-is' and 'to-be' ('as is' being the current operating model / 'to be' being the target operating model) and how the go-to-market plan supports the proposition and the organisation's sales and growth plan.
- What are the component parts of the marketing plan.
- How is the market proposition linked and evolved into the go-to-market plan.
- Highlight the importance of engaging with the right business stakeholders when communicating, agreeing and signing-off the plan.
- Conduct practical exercise to provide students with greater understanding of the component parts.

### **3.3 I can describe the essential activities for a Go-To-Market Plan.**

- Introduce the topic of messaging and tone of voice.
- Use of marketing contact through a range of unsolicited marketing channels (e.g. email, letter, unsolicited mini-proposal, phone call).
- Using Direct mail – use of personalised letters that go directly into the hands of the intended recipient (rather than a Junk folder).
- Introduction to Social Media and Digital Advertising, Google Search and GoogleAds, LinkedIn and LinkedIn Ads/ Video, Facebook/Facebook Messenger, TikTok, Instagram, Twitter, Blogging, Webinars, Podcasts.
- Consider Value of Events – sponsorship of events and networking, partnership working and benchmarking/networking through industry bodies, Whitepapers, Trade Journals and Magazines, Conferences and conference speaking.
- Importance of PR Communications – lobbying and media articles.

### **3.4 I can develop a basic Go-To-Market plan with key tasks and timelines.**

- Introduce the components that make up an effective communications and marketing plan.
- Describe the methods for translating the go-to-market plan into a communications and marketing plan.
- Conduct practical exercise to provide students with greater understanding of aligning messaging to channel, market and media
- Provide examples of best practice.
- Highlight the importance of engaging with the right business stakeholders to develop the plan.

### **3.5 I understand the value of pilot campaigns and how to improve them.**

- Be able to understand what working to a delegated budget is.
- Supporting input to the creation of Marketing Collateral/ Content and what it is trying to achieve e.g., awareness, uniqueness, why better.
- Understanding the importance of consistency and branding.
- Looking at the use of pilots and starting small to test results to inform larger campaigns.

- Discussing what a pilot might look like.
- Processes to review and sign off content and campaigns.

**3.6 I can describe how to measure marketing campaign effectiveness using key metrics.**

- Be able to describe the methods for developing a measurable plan of action by channel and media.
- Be able to interpret the outcomes from marketing measurement reports, review and understand trends, and the recommended actions.
- Create an understanding of website and Google analytics and levers that drive usage and uptake.
- Run through case studies of best practice.
- Practical exercise to discuss what the next steps might be based on the report recommendations.

## Accessibility Policies

TLM firmly believes that every learner should have an equal chance to excel in their studies and assessments, regardless of any disabilities they may have. To achieve this goal, TLM has developed a comprehensive and well-structured reasonable adjustment policy that is specifically tailored to cater to the needs of learners with disabilities. This policy is not only an essential aspect of TLM's commitment to inclusivity but also an integral part of creating a diverse and accessible learning environment.

The reasonable adjustment policy is designed to support learners with disabilities in various ways. It encompasses a range of accommodations, such as providing additional time for examinations, offering alternative formats for study materials, permitting the use of assistive technology, arranging for sign language interpreters, and ensuring accessible physical facilities. The implementation of these reasonable adjustments is meticulously carried out to ensure that they meet the individual needs of each learner, acknowledging the unique challenges they may face.

TLM is dedicated to making the reasonable adjustment process transparent and easily accessible for all stakeholders. Thus, the details of the policy are made readily available to all, including learners, educators, and TLM Centres. These details can be found on TLM's official website, ensuring that everyone is well-informed about the support and accommodations available to learners with disabilities.

Additionally, TLM Centres play a crucial role in facilitating this process. They are empowered to submit requests for other reasonable adjustments on behalf of learners, based on their specific requirements and circumstances.

TLM firmly believes that promoting a culture of inclusivity and understanding is fundamental to fostering an environment where learners can thrive, irrespective of their abilities or disabilities. By continuously evaluating and refining its reasonable adjustment policy, TLM ensures that it remains up-to-date with the best practices in the field of inclusive education.

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TLM Accessibility Policy: <https://tlm.org.uk/policies/general-requirements-for-regulated-qualifications/#3>

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