

PROCUREMENT TALK, S8 E7

BULLETPROOF EVALUATION PLANS

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Welcome to Procurement Talk and this is your host David Byrne.

Procurement Talk is for procurement and business professionals where we provide insights and solutions to your procurement challenges.

Hello and welcome to Procurement Talk. This is your host David Byrne. It's great to be back for another episode.

David: I've got Joshua Byrne in the studio with me. How are you, Josh?

Josh: I'm very well, thank you. How are you going?

David: Yeah, good, good. This episode, we're going to be talking about a Bulletproof Tender Evaluation Plan. It's a really important subject, and it's about having a transparent process. Thoughts on that, Josh?

Josh: Yeah, it's really integral for a business, you know, to really make sure that they're bulletproof when they're going to tender and to make sure that they can't, I guess, a retaliation from a supplier. So to really support themselves as a business and to make sure they're doing things correctly.

David: Yeah, and being able to withstand that scrutiny further down the road. It's imperative for good decision-making. It protects the panel from any bias, even an accidental bias. You see that, don't you, Josh?

Josh: Yeah, very true. You really need to make sure as a business that you are protected in that sense, especially on that supplier panel selecting team. That is really important.

David: And I suppose the key here is we do talk about a tender evaluation plan. And you'd be surprised at how many people don't take the time up front to actually write a plan. It's an important part of it to actually spend the time, think about the evaluation plan that you want to put in place so that you get it right from the start.

Josh: Yeah, well, you can't go into a tender, and then start evaluating suppliers if you don't really know what you're actually evaluating them for. So it's really important that you have that preparation going into it so that you're not backtracking or wasting time really while the process is happening.

David: And what it does is it gives the panel, it gives that probity process, if there is a probity process, and it gives the organisation that level of comfort that you're making good decisions, and it even makes the evaluation process even smoother and faster if you have done an evaluation plan at the very start.

Josh: Yeah, correct. As I said, it's important that you have, I guess, all your ducks in order, as the saying goes, going into that process, which is really just going to help you as the organisation and as the panel make that process smooth and as easy as possible.

David: So having that criteria at the start and being really sure about the evaluation plan, firstly being clear and measurable criteria, so understanding the clarity of the business requirements that you've tendered for and that you're putting together the evaluation plan so that every item that is to be evaluated is clear and measurable. So therefore, there's no ambiguity in what you're actually going to undertake.

Josh: Have you got any examples of where potentially you've seen an evaluation panel where that process hasn't been set up and there's been some miscommunication or maybe something where people have misinterpreted or seen something in different senses?

David: I have seen that happen. And when you have an evaluation that's not well planned, it tends to go astray and people then start making assumptions. And it just really complicates the evaluation process if you haven't actually completed that evaluation plan and effectively communicated that at the start. The examples that I could give, it doesn't end well because that ambiguity amongst the evaluation team, it starts to the finger pointing. So being the person who is in control of the process

is important. And this really is about leadership through that evaluation process because the employees are looking to you as the procurement expert leading the process to provide the right level of guidance.

Josh: Yeah, very true. I can say for myself, I've once sat on a panel and I had multiple different evaluators that interpreted one question in completely different senses. So you've got one person that saw this question focusing on someone's experience, one person was looking at methodology and someone thought it was about pricing. Obviously if you can just have a simple question like that or a simple question be interpreted multiple different ways, it can make it very difficult to actually evaluate because all people are looking at different criteria. So having that clear explanation and clear questioning going in can be really beneficial because that, as an example, extended the process by weeks, which should have been a much shorter process.

David: And that comes back to that clear and measurable criteria. So that if you've got that up front, you've documented it, and it's really clear to all parties that are undertaking the evaluation, that ambiguity that you just spoke about gets taken away. And it gives the panel that's doing the evaluation, a higher level of comfort about what they're actually looking for from the supplier.

David: And I suppose the next part that comes into it is the weighting system and how you're actually going to weight each of the suppliers and giving some guidance to the business on that weighting and why you've structured it a particular way. You sometimes see an evaluation that's got a weighting of - It could be a simple yes and no, or it could be a one-to-five criteria. It really does vary. And the reason for that variation, it really depends on each of the particular questions and what you're looking for from the suppliers. And I suppose it also, in some ways, you give the supplier the ability to add additional information and that can in turn inform the panel.

Josh: Yeah, and I think it's really important as well when you have a scoring metric that you have not just a really basic one to five, or if you have a one to five it not just be five as excellent one is poor, you know it really needs to be a clear explanation of the criteria of what actually meets an excellent rating of five if it is that, so what does the supplier or the business need to provide, is it value for price value for money all these different things. And it can be a whole host of variety of options, but it needs to be quite obvious, I believe, of what is that excellent score for that particular rating. So rather than just having five as excellent, because it can be quite challenging when, you know, when going in to see the value, I guess.

David: And that value question is something that is open to interpretation. The value, price question frequently comes in and people who are undertaking that scoring between the excellent and the poor might value something different. And I think that's as part of that evaluation plan that towards the end of it, when you do get the team together, that you have that open discussion about why there is a variance with some people who have made those scores.

Josh: Yeah, and it is important to have that clarity in the scoring itself and also the role that people have within the evaluation panel. You know, making sure that there's when the plan itself is rolled out, it's clearly defined, who is potentially doing the scoring, who's consolidating... what each role that the person has within that panel so that you're not doubling up on work especially as well. You know, you will need to have potentially two people that can have a conversation about their potential scoring. So it's not just one person's weighting, but you need to make sure that you're not overlapping with it too much work. Otherwise, you're just wasting money and wasting hours going over an evaluation that rather than weeks, could potentially just take one or even a few days, depending on how well you've pre-planned going into it.

David: I want to have a chat now about conflict of interest. It's a hot topic when you come to evaluation plans, and I think it must be addressed. As a procurement expert leading the process, you must air this, and you've got to undertake clearly at the start of the process a declaration with everyone that sits on the panel so that you don't have a conflict or interest, and if there is a conflict it's declared and if possible managed, if not well then that person might have to step off the evaluation process. But a conflict of interest is very much out there we see that a lot and it's just something as professionals we need to manage

Josh: Yeah, very true. Conflict of interest can be in any walk of life, really, especially when you get into very specialised work that's required, there's potentially conflict of interest that occurs all the time and really regularly. But it's important that we just acknowledge it because sometimes there may be a conflict of interest with the supplier, but we still need to proceed with them.

David: Very true. And having that understanding and having an appropriate process in place to identify, manage that conflict, and record it so that it is transparent and reported as part of the evaluation plan and evaluation report, is an important aspect of the process and making sure it continues to flow through okay.

So when we're assessing the criteria, we're going to have mandatory criteria and also non-mandatory criteria. And I suppose this does give suppliers the flexibility to value-add in some respects, items that we may not know about, and so it opens the door for the supplier to highlight some of the key issues while also addressing our key criteria that we've identified as mandatory.

Josh: Have you by any chance got any examples of potentially mandatory, or non-mandatory criteria that may become available, or that suppliers may need to provide? Obviously mandatory might be things like police checks or, you know, financial reports and those sorts of things.

David: And but then you might have the non-mandatory, might be open to any other additional services that they could provide, so you may want that strict control around, like you highlighted, the police checks and those sorts of activities. But as part of this and the wider scope, you may open it up to non-mandatory criteria like any additional services that could be of interest to the organisation, or there could be some lesser known services that you're after but you don't really need to specify at this stage.

Josh: yeah, is there when completing all these checks and going through the evaluation part is there a particular order that you think might be most beneficial, because you know as the evaluation team you'd hate to get to start doing interviews and really like a potential supplier, but then at the very end, you find out maybe they've had, you know, previous fraud events or things that may potentially really impact an organisation.

David: Yes, and I think the first thing is that you do those mandatory items and checks that you must have as part of it. You go into this process with some clear and very precise requirements that you want, and they form part of the mandatory checks. Then moving through, obviously, the price criteria, and whilst price is always a component, it shouldn't be the key component. In some cases, it does knock people out, suppliers out, because they just overpriced it. Or it could be that they underpriced so much and you're concerned about the quality. You sometimes see that, that you get a low ball and you just really question, are you guys right for this?

Josh: Yeah, well, you know, the classic saying of buy cheap, buy twice.

David: Yes, so you don't want to go into that process, so you just need to be mindful around the price process and having some ideas. And then risk and the due diligence activities all come together as part of that assessment in understanding that evaluation process.

So in pulling all those points together, whether having that plan, making it clear and measurable, the weightings, the role clarity, the scoring guidance, the conflict of interest, the mandatory and non-mandatory, and having a clear idea of the sequence that matters. All those coming together make a very good and effective bulletproof tender evaluation plan. And they are some really good practical tips that hold the process together. And I think the last one that I'd really like to touch on is bringing the evaluation team together to discuss the measuring and how they've measured. That's an important part, to bring the team together and have that collaborative talk.

Joh: Yeah, very true. And I think as well, another really important note is when you're interviewing or meeting with suppliers or going through their reports or their tender, that you make really good notes, and have really good dot points of key points that they've made or spoken about. And then when you go into those meetings where we have the whole evaluation team and everyone's there and has that ability to meet, all as one, everyone will then have really good information and you're not just going based on memory of what you think they may have said or spoken about, which is, it is really important because sometimes, especially when you're going through and evaluating multiple tenders, you might start to mix people's information in different companies. So it's really important that you have that distinguished note-taking, which can then differentiate between those suppliers and what they're providing for your organisation.

David: That's a great point, Josh, because eventually you're going to have to do a supplier debrief. And as part of that debrief, the supplier will want to know where they went wrong and where they could possibly improve. And if you haven't done those notes, you're just going to let yourself down. You're going to let the supplier down and you'll not be able to give that quality debrief that you're looking for.

Josh: Yeah, exactly. Well, you know, if a supplier's unsuccessful, they would like to know why and what they can do to improve on to make sure they win the next tender.

David: So there you have it. That's our bulletproof tender evaluation plan. A big thank you to Josh for joining us today.

Josh: Thank you very much. I really appreciate it. It's been a great time.

David: Thanks Josh and all the very best and bye for now.

So there you have it, all the very best and bye for now.

This concludes this episode of Procurement Talk. Thank you for listening.

Procurement Talk is brought to you by David Byrne and BWD Consulting. We're helping organisations transform procurement. Talk to you again soon. Bye for now.