PRE-CONTRACT ESSENTIALS



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Introduction

Pre-Contract Essentials examines the work that must be done correctly before signature determines whether a contract succeeds or fails. This Training Course covers requirement definition, market engagement, tender documentation, bid evaluation, and negotiation through to award. Participants study risk assessment, due diligence, approval governance, and the drafting that closes deals. Furthermore, the programme connects preparation quality to contract outcomes through case review and tender simulation. As a result, delegates leave able to set up contracts properly rather than fixing problems afterwards.

Pre-Contract Essentials Course Objectives

- Define the pre-contract phase and its role in contract success.
- Translate business needs into clear requirements and specifications.
- Run market engagement and supplier prequalification properly.
- Prepare tender documents, evaluation criteria, and pricing schedules.
- Assess counterparty capability, capacity, and financial standing.
- Apply due diligence including sanctions, integrity, and compliance checks.
- Allocate risk and confirm insurability before commitment.
- Draft terms, negotiate positions, and record agreed concessions.
- Manage internal approvals, mandates, and sign-off governance.
- Prepare for contract execution, mobilisation, and handover.

Course Methodology

- Interactive workshops using real pre-contract files and tender packs.
- Structured requirement definition and specification writing labs.
- Tender evaluation exercises with weighted scoring matrices.
- Guided due diligence and risk assessment practice sessions.

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- Negotiation simulation on commercial and risk terms.
- Action planning that converts each session into a workplace commitment.

Who Should Take This Course

- Procurement and sourcing professionals.
- Contract managers and administrators.
- Commercial and project managers.
- Legal counsel and contracts advisors.
- Finance and business case analysts.
- Risk, compliance, and integrity officers.
- Technical and engineering staff defining requirements.

Pre-Contract Essentials Course Outlines

Day 1: Requirement Definition and Business Case

- Defining the pre-contract phase and its deliverables.
- Translating business needs into functional requirements.
- Writing specifications, scopes, and statements of work.
- Make-or-buy and delivery model assessment.
- Business case, budget, and funding confirmation.
- Stakeholder alignment and internal customer engagement.
- Approval gates and mandate definition.

Day 2: Market Engagement and Prequalification

- Market research and supplier landscape analysis.

- Early market engagement, RFI, and industry days.
- Prequalification criteria and capability assessment.
- Financial standing and creditworthiness checks.
- Sanctions, debarment, and integrity screening.
- Conflict of interest and confidentiality controls.
- Building the approved bidder list.

Day 3: Tender Documentation and Evaluation Design

- Structure of the invitation to tender (ITT) package.
- Instructions to bidders and submission formalities.
- Evaluation criteria, weightings, and scoring methods.
- Pricing schedules, bills of quantities, and rate build-ups.
- Contract conditions and special terms in the draft.
- Bid security, validity, and clarification rules.
- Clarification meetings and addenda management.

Day 4: Due Diligence, Risk, and Pricing Analysis

- Technical, commercial, and legal due diligence.
- Risk identification, allocation, and transfer decisions.
- Insurability review and liability cap setting.
- Total cost of ownership and lifecycle costing.
- Benchmarking prices and testing reasonableness.
- Abnormally low bid and viability assessment.
- Preparing the evaluation report and award recommendation.

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Day 5: Negotiation, Approval, and Execution

- Negotiation mandate, strategy, and red lines.
- Negotiating price, schedule, warranties, and remedies.
- Recording concessions and agreed positions.
- Internal approvals and delegated authority compliance.
- Contract execution formalities and signatures.
- Mobilisation planning, transition, and kick-off.
- Personal action plan and continuous improvement.

Conclusion

By successfully completing Pre-Contract Essentials, participants will have acquired a practical command of requirement definition, market engagement, tender design, due diligence, and negotiation. They will know how to set up contracts on sound commercial and legal foundations, confirm counterparty credibility, and secure approval on documented terms. In addition, the course prepares delegates to hand over a complete contract package for mobilisation. As a result, they return to work ready to prevent problems before signature rather than resolving them afterwards. Gentex Training Center delivers this Training Course with a practical, standards-based approach.

FAQs for the Pre-Contract Essentials course

Q1 What is the "Pre-Contract Essentials" course about?

It is a five-day programme that explains the work required before a contract is signed. It covers requirement definition, market engagement and prequalification, tender documentation and evaluation, due diligence and risk allocation, pricing analysis, negotiation, approval, and contract execution.

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Q2 What are the key benefits of the "Pre-Contract Essentials" course?

Participants gain the ability to define requirements clearly, evaluate bidders on evidence, and confirm counterparty credibility before commitment. They also learn to allocate risk sensibly, secure approvals on documented terms, and prepare a complete package that mobilisation teams can act on without rework.

Q3 What skills will I gain from the "Pre-Contract Essentials" course?

Requirement definition with specification and scope writing, market engagement and prequalification assessment, tender evaluation and due diligence with risk allocation, and negotiation, approval, and contract execution administration.

Q4 What tools, methods, or standards are covered in the "Pre-Contract Essentials" course?

The course covers functional and output specification drafting, make-or-buy assessment, request for information (RFI) and early market engagement methods, prequalification criteria and financial standing checks, sanctions and debarment screening lists, invitation to tender (ITT) package structures, weighted evaluation criteria and scoring matrices, pricing schedules and bills of quantities, bid security and validity provisions, abnormal low bid analysis, total cost of ownership and lifecycle costing, negotiation mandate and red-line drafting, delegated authority and approval gate frameworks, and contract execution and mobilisation checklists.

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Q5 How is the "Pre-Contract Essentials" course applied in real-world practice?

Delegates apply it through requirement specifications, business cases, prequalification packs, tender documents, evaluation reports, due diligence files, risk allocation schedules, negotiation mandates, approval papers, contract documents, and mobilisation plans. They also use it to brief approval committees and to prepare audit-ready procurement and contracting records.