

Tender Intake & Immediate Action Control

Stage 1 case study | Fixed-wing aviation services tender

The assignment

Convert a 10-document tender package into a controlled bid-start record: register the package, identify immediate obligations, surface submission risks and establish the actions that must be completed before detailed proposal development.

CASE PROFILE	RECORDED AT INTAKE
Issuing organisation	Client
Responding entity	Company
Scope	Provision and operation of one Dash 8 Q400 fixed-wing aircraft for personnel, cargo and mail movements, with the supplier responsible for aircraft operation, maintenance and supporting resources.
Tender package	10 core documents: invitation, bidder instructions, technical ITT, technical submission requirements, supplier qualification questionnaire, contract template, aviation standards, local-content requirements, HSE/CHESM questionnaire and NCEC template.
Proposed term	Two years plus one optional year.
Submission route	Electronic submission through the designated tender portal; hard-copy and CD responses not accepted.

Case-study note

Client identity, tender reference, named contacts and other identifying details have been removed. The example focuses on the bid-control work performed at Stage 1.

First, establish exactly what has been received

Stage 1 begins by turning the incoming tender into a controlled record. The invitation listed 10 core documents, so the first completeness check was against that list rather than against filenames alone.

DOCUMENT GROUP	INTAKE TREATMENT
Invitation + bidder instructions	Registered as the governing source for receipt, intent response, communication route, submission method, bid conditions and portal instructions.
Technical ITT + submission requirements	Registered for detailed requirements mapping. Immediate Stage 1 flags included aircraft/service scope, technical response rules and mandatory technical/commercial separation.
Supplier qualification questionnaire	Registered for eligibility/evidence review, including corporate capability and qualification information required from Company.
Contract template + aviation standards	Registered for later technical and commercial review. Stage 1 does not attempt to resolve the full contract position; it ensures the documents are present and assigned to the correct downstream review.
Local-content + HSE/CHESM + NCEC	Registered as specialist workstreams requiring early ownership because their evidence may depend on HSE, HR, operations, supply chain and local-content inputs.

Package-completeness control

The invitation's document list becomes the baseline. Any referenced document that is absent, inaccessible or superseded is logged as an exception and assigned for resolution before the team relies on the package.

Scope context captured at intake

The service requirement covered a Dash 8 Q400 aircraft for Company operations, including personnel and material transportation. The supplier would be responsible for aircraft operation, maintenance and parts support, subject to applicable aviation regulation and the Client's aviation standards. These points were recorded as context for later technical review - not treated as proof of compliance at Stage 1.

What had to happen before proposal writing accelerated

The intake review converted buried instructions into explicit actions. Each action is linked to the source requirement, an owner and evidence of completion in the working workbook.

ACTION	CONTROLLED RESPONSE
Intent to bid / decline	Notify the bid owner within five working days of receipt. The working record must retain the actual response date and evidence; it should not assume that an email was sent merely because the requirement exists.
Portal access	Confirm Company can access the tender portal and that more than one authorised person can support continuity. Access readiness is checked before the submission window becomes critical.
Clarifications	Use the authorised portal clarification folder where functional; otherwise use only the stated written fallback channel. Verbal clarifications are not treated as valid tender instructions.
File preparation	Observe the stated 2 MB per-document limit; use permitted Microsoft Office/PDF formats; do not submit compressed ZIP/RAR files; verify correct extensions before final submission.
Technical / commercial separation	Keep pricing and commercial values out of the technical bid. The instruction states that commercial content in the technical package can lead to disqualification.
Eligibility evidence	Flag current regulatory registration and evidence of major jobs in progress for inclusion/checking. Where a JV/consortium applies, signatory and contracting-entity requirements must also be verified.
Submission continuity	Do not leave upload to the deadline. Save/hold uploads during preparation, verify uploaded files, and retain final submission evidence after release.

Why these controls matter

A tender team can have a strong technical solution and still fail administratively. Stage 1 converts submission rules into visible actions early enough for the team to manage them.

Two different submission dates appeared in the package

The review identified a material inconsistency that should not be resolved by assumption.

Earlier instruction

The bidder instructions stated a technical and commercial bid deadline of 25 June 2020 at 16:00.

Later instruction

The bid timetable and invitation material stated 26 June 2020 at 16:00.

CONTROL STEP	ACTION RECORDED
1. Preserve both sources	Do not overwrite the earlier date with the later one. Record the contradiction and its source locations.
2. Protect the bid	Use 25 June 2020 at 16:00 as the conservative internal control deadline until written clarification confirms otherwise.
3. Raise clarification	Submit a written clarification through the authorised tender channel asking the Client to confirm the governing deadline.
4. Update controlled records	When the Client responds, update the deadline, action register and affected planning records while retaining the clarification evidence.
5. Communicate the change	Ensure technical, commercial and submission owners work to the same confirmed deadline and internal cut-off.

Stage 1 finding

The value of intake control is not simply extracting dates. It is detecting when two authoritative-looking instructions disagree and preventing the team from building its plan around an unverified assumption.

Management view after initial intake

The dashboard summarises the bid-start position so management and the bid team can see what is controlled, what still needs evidence and what requires escalation.

DASHBOARD ITEM	STATUS / MANAGEMENT NOTE
Package completeness	10 core documents identified from the invitation and registered. Confirm the portal contains no later addenda, replacement files or additional mandatory forms before detailed review begins.
Confidentiality / external use	Confidential tender material must remain within authorised use. Obtain Client approval before Company makes ITT material public where disclosure is proposed. For external tools or collaborative processing, confirm Client restrictions and Company information-security/AI policy before uploading tender content.
Intent response	Client requires bid/decline intention within five working days of receipt. Record the authorised decision, actual response date, channel used and evidence of transmission.
Clarification route	Portal clarification channel is the primary route; the stated written fallback channel applies if the portal function is unavailable. Telephone/verbal clarification is not accepted as valid.
Submission method	Electronic portal submission only. Hard copy and CD are not accepted. Portal access, backup access and upload readiness should be confirmed before the internal cut-off.
Technical / commercial split	Technical and commercial responses must remain separate. No prices or commercial values should appear in the technical package; this is a disqualification-sensitive control.
File controls	Maximum stated file size is 2 MB per document. Use permitted Office/PDF formats, avoid compressed files and verify filenames/extensions after upload.
Deadline	RED / CLARIFICATION REQUIRED: source documents contain 25 June and 26 June deadlines. Work to the earlier date until Client confirms the governing deadline in writing.

What the bid team has before moving to detailed review

OUTPUT	WHAT IT ENABLES
Controlled tender record	One place for tender identity, receipt route, key dates, status, submission channel and responsible bid owner.
Document register	A checkable record of the 10-document package and a mechanism for flagging missing, inaccessible, replaced or later-added documents.
Immediate-action register	Early obligations are converted into owned actions with due dates, source references, status and completion evidence.
Confidentiality / AI-use gate	Tender information is not automatically uploaded to external AI tools. Client restrictions, Company policy and data sensitivity are checked first.
Critical-issue visibility	The conflicting deadline is visible as an unresolved control issue rather than hidden inside narrative documents.
Handover into later stages	Detailed compliance mapping, clarifications, technical solution development, commercial/contract review and final submission control can proceed from a traceable Stage 1 baseline.

Working notes

N/A is deliberate: where a field genuinely does not apply, it is marked N/A rather than left blank. **Not stated is different:** where the tender does not provide the information, the record says Not stated and may trigger verification. **Requirement is not evidence:** identifying an acknowledgement, registration or submission requirement does not mean Company completed it; actual completion needs dated evidence. **Stage boundary:** Stage 1 establishes control and routes issues. It does not replace detailed compliance, technical, commercial or legal review.

MethodBridge AI - Tender Management Systems

Structured tender workflows for intake, requirements and compliance, coordination, clarifications, technical response, commercial and contract review, proposal integration and submission control.

From complexity to opportunity.