

Tender Intake & AI Readiness Starter Kit

A practical pre-writing control kit for SMEs, growing bid teams and independent bid professionals. Use it when an ITT, RFP or RFQ arrives - before drafting begins.

Inside this free kit

1. 20-point tender intake checklist
2. AI-use safety gate for confidential tender material
3. Nine-stage AI opportunity map
4. Five practical starter prompts with human-verification controls
5. A simple escalation rule for gaps, conflicts and missing evidence

MethodBridge AI principle: AI can accelerate document-heavy work, but it should not silently make compliance, legal, commercial or submission decisions. Keep a named human responsible for verification.

From complexity to opportunity.

Why this starter kit exists

Many tender resources begin with proposal writing. MethodBridge AI starts earlier: establish control over the tender package, identify what can disqualify the bid, decide what AI may safely assist with, and make gaps visible before the team starts drafting.

This kit is intentionally lightweight. It does not replace a full compliance matrix, bid plan, legal review, commercial review or the MethodBridge AI Bid Manager System. Its purpose is to help a small team establish a disciplined starting point quickly.

The 5-minute control test

Do we know the controlling submission deadline and time zone?	Escalate immediately. Do not assume.
Do we know exactly what must be submitted and through which channel?	Create a submission requirement list.
Have all tender documents, appendices and amendments been accounted for?	Log missing items and verify the portal/source.
Are technical and commercial information required separately?	Create a separation control before drafting.
Do we know whether confidential tender material may be uploaded to external AI tools?	Stop external upload until policy/permission is confirmed.

1. Tender Intake & Compliance Starter Checklist

Mark each item: **YES**, **NO**, **UNCLEAR** or **N/A**. Do not use a blank cell to hide uncertainty.

A. PACKAGE CONTROL	1	All files listed in the invitation/portal are present and accessible.	_____
	2	Document versions, revision dates and addenda/amendments have been checked.	_____
	3	Referenced attachments, schedules, forms and appendices have been accounted for.	_____
	4	Confidentiality, permitted-use and information-security restrictions have been identified.	_____
B. DEADLINES & COMMUNICATION	5	Final submission date, exact time and time zone are recorded.	_____
	6	Clarification deadline and approved clarification channel are recorded.	_____
	7	Bid acknowledgement / intent-to-bid / decline requirement and deadline are recorded.	_____
	8	Any conflicting dates or instructions have been logged for written clarification.	_____
C. SUBMISSION CONTROL	9	Submission route is confirmed: portal, email, physical delivery or other prescribed method.	_____
	10	File format, file size, naming, signature and upload rules are captured.	_____
	11	Technical and commercial separation rules are understood and controlled.	_____
	12	Required forms, declarations, certificates and schedules are listed.	_____
D. REQUIREMENTS & EVIDENCE	13	Mandatory / pass-fail requirements have been identified.	_____
	14	Evaluation criteria and any stated weightings have been captured.	_____
	15	Evidence needed to prove compliance has been identified - not merely assumed.	_____
	16	Each major requirement has a named internal owner or function.	_____
E. BID CONTROL	17	Preliminary bid/no-bid decision is recorded with assumptions and unresolved issues.	_____
	18	Material gaps, exceptions and clarification questions are visible in one control log.	_____
	19	Response location will be tracked as the proposal develops, so each requirement can be traced to its answer.	_____
F. AI READINESS	20	Before tender content is uploaded to AI, the team has confirmed client restrictions, company policy, tool/data controls and required human verification.	_____

Escalation rule: Any NO or UNCLEAR item that can affect eligibility, deadline, submission method, mandatory evidence, confidentiality or disqualification should be assigned and resolved before the team relies on an assumption.

2. AI-Use Safety Gate

AI can be useful for extraction, comparison, summarization, drafting support and quality checks. But a tender may contain confidential, proprietary, personal, commercially sensitive or client-restricted information. The decision to upload content to an external AI service must therefore be made before the upload - not after.

1. Client restriction	Does the tender, NDA, portal or contract restrict disclosure, external processing or use?	If yes/unclear: do not upload until the permitted use is confirmed.
2. Company policy	Does your organization permit this AI tool for this class of information?	If no/unclear: use an approved environment or keep the task offline/manual.
3. Tool/data terms	Do you understand the account type, retention, training/data-use and admin controls relevant to the tool?	Verify current vendor documentation; do not rely on assumptions from a consumer plan.
4. Data minimization	Can the task be completed with a redacted excerpt rather than the full tender?	Use the minimum necessary content and remove identifiers where practical.
5. Human verification	Who is responsible for checking the AI output against the source?	Name the reviewer before the output is used in the bid.

Simple rule: If the AI-use decision is not clear, keep the tender material out of the tool until it is clear. AI convenience should never override a client confidentiality obligation or your organization's information-security rules.

Human verification levels

Level	Typical AI assistance	Human control
LOWER RISK	Reformatting, brainstorming, generic checklists using non-confidential information.	Review for usefulness and accuracy.
CONTROLLED	Requirement extraction, summaries, document comparison, first-draft responses using permitted tender content.	Verify every material output against the source and approved company evidence.
HIGHER RISK	Compliance decisions, legal/commercial interpretation, pricing, commitments, exceptions, final submission decisions.	AI may assist analysis, but accountable specialists must decide and approve.

3. Where AI Can Assist Across the 9-Stage Tender Lifecycle

This map is tool-agnostic. Specific AI products should be selected only after checking current capabilities, data controls, cost and organizational approval.

1	Tender Receipt, Intake & Immediate Action Control	Document inventory; deadline/obligation extraction; compare invitation against package; flag conflicting instructions.	Controlling deadline, package completeness, intent response, confidentiality decision.
2	RFP/ITT/RFQ/RFI Analysis & Compliance Matrix	Extract candidate requirements; explain dense clauses in plain language; classify requirements; trace source references.	Completeness, compliance status, interpretation, evidence sufficiency.
3	Bid Planning, Responsibility & Strategy	Suggest work breakdown; summarize requirements by function; draft owner briefings and meeting agendas.	Owner assignment, priorities, internal commitments and deadlines.
4	Clarification, Gap Analysis & Resolution Control	Cluster gaps; draft neutral clarification questions; compare responses/addenda against open issues.	Whether clarification is needed; final wording; formal submission through prescribed channel.
5	Technical & Supporting Response Development	Create first-draft structures; transform approved evidence into buyer-focused draft language; consistency checks.	Technical truth, differentiators, proof, commitments and final response.
6	Commercial, Pricing & Contract Review	Extract clauses, obligations and commercial assumptions; compare versions; surface areas for specialist review.	Legal/commercial interpretation, pricing, exceptions, approvals and risk acceptance.
7	Proposal Integration, Review & Approval	Check consistency, terminology, cross-references, repeated claims and missing sections.	Win strategy, evaluator relevance, final narrative and approvals.
8	Final Submission Control	Run checklist-style completeness review; compare matrix against proposal; flag unresolved placeholders.	Final compliance decision, signatures, evidence, authorization to submit.
9	Post-Submission, Clarifications & Lessons Learned	Generate submission checklist; organize evidence log; summarize lessons learned after submission.	Actual upload/submission, receipt evidence, retention and post-bid decisions.

4. Five Starter Prompts

Use these only with information you are permitted to process in the selected AI environment. Replace bracketed text. Always compare the output back to the original tender.

Prompt 1 - Package inventory

Act as a tender-document control assistant. Review the permitted documents I provide. Create an inventory showing: file/document name, document purpose, version/date if stated, referenced attachments, and any referenced item that appears missing. Do not assume a missing document is not required. Separate facts from issues requiring human verification.

Prompt 2 - Immediate obligations

From the permitted tender material, extract only immediate bidder obligations that occur before or at submission: acknowledgement/intent, clarification deadline/channel, bid deadline/time zone, portal or delivery method, file restrictions, signatures, mandatory forms and technical/commercial separation. For every item, cite the source document and section/page if available. Mark anything ambiguous as UNCLEAR rather than resolving it yourself.

Prompt 3 - Candidate compliance requirements

Create a candidate requirements list from the permitted tender text. For each requirement provide: source reference, concise requirement, requirement type, mandatory/pass-fail indicator only if explicitly supported, evidence requested, and suggested internal function. Do not decide that our company complies. Leave compliance status for human review.

Prompt 4 - Conflict detector

Compare these permitted tender sections and identify conflicting or inconsistent instructions involving dates, submission routes, document formats, contract references, quantities, scope, eligibility or required evidence. Quote only the minimum words needed to show the conflict. Do not choose which instruction controls; create a clarification issue for human review.

Prompt 5 - Human verification check

Review the AI-generated tender notes below against the source material I provide. Produce three sections: VERIFIED FROM SOURCE, NOT SUPPORTED BY SOURCE, and NEEDS HUMAN JUDGEMENT. Treat legal interpretation, commercial commitments, compliance decisions, pricing, exceptions and final submission decisions as human judgement even if the text appears clear.

5. What This Kit Adds

Public RFP resources commonly provide compliance matrices, response templates, prompt libraries and AI-assisted requirement extraction. MethodBridge AI deliberately combines several controls at the point where smaller teams are most exposed: **pre-writing intake control, AI-use/confidentiality gating, source traceability, explicit human-verification ownership, and a stage-by-stage map of where AI should and should not assist.**

The aim is not to compete with enterprise proposal platforms feature-for-feature. It is to give SMEs and growing teams a disciplined operating method they can use with accessible tools, while larger organizations can apply the same controls alongside their existing systems and governance.

When this free kit is no longer enough

Move to a full bid-management system when you need a live compliance matrix, named owners, clarification control, technical response development, commercial/contract review, integrated proposal review, final readiness control and submission close-out across one repeatable process.

MethodBridge AI Bid Manager System

A structured nine-stage tender-management system designed to help teams move from receipt to submission with clearer controls, practical AI assistance and human verification built into the workflow.

For SMEs: a practical alternative to starting with complex enterprise software.

For larger organizations: a structured method that can support targeted review, tailored workflows and existing bid-governance environments.

Important: This resource is operational guidance, not legal advice and not a substitute for the tender documents, client instructions, organizational policy or specialist review. Requirements vary by procurement, sector and jurisdiction.

Research basis for this edition

- World Commerce & Contracting - practical checklists and guidance; AI contracting guidance emphasizing accountability, reliability, regulation, data, confidentiality and oversight.
- Loopio - public compliance-matrix, RFP process and AI-prompt resources; demonstrates the market already provides individual templates and AI resources.
- Responsive - public requirements-analysis and AI response-management materials; demonstrates enterprise AI extraction, response generation, quality checks and human-in-the-loop controls.
- AutoRFP.ai - public compliance-matrix and AI document-import materials; demonstrates automated requirement extraction and AI-supported compliance workflows.

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