MERCURY

Implementing the Pre-Award Phase of a Project or Major Procurement

6 – 10 September 2027
New York (USA)



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Ref: 9407_1061086 **Date:** 6 – 10 September 2027 **Location:** New York (USA) **Fees:** 7900 Euro

Introduction:

This manual pre-award procurement and project implementation course covers all aspects of contract management, from developing the business case and verifying the need to relationship management, contract administration, and contract performance evaluation.

The operations comprise separate but related phases upstream and downstream of the contract award. The guide's generic nature means that its principles should apply to all contracts, from simple orders to complex construction or service contracts. It should be equally applicable to contracts in both the public and private sectors.

Pre-Award Planning:

- Scope Formulation.
- Contracting Strategy Formulation.
- Prequalification.
- Preparing/Reviewing Contract Conditions.
- Preparing/Reviewing Special Technical Requirements.
- Tender Package Preparation.
- Bidding Process Management.
- Bid Evaluation.
- Award and Contract Agreement.
- Program Content.
- Industry Terminology and Standards.
- Pre-Award Work Process Flow Charts.
- Understanding the Need for and How to Prepare and Analyze.

Targeted Groups:

- Contracts, Tendering, Purchasing, Procurement, and Project Personnel.
- Contract Administration, Engineering, Operational, and Maintenance Personnel.
- Risk, Claims, Financial, and Audit Personnel.
- Project Management Professionals.
- This pre-award procurement and project implementation course is for all others involved in planning, evaluating, preparing, and managing tenders, specifications, awards, and contracts that cover the acquisition of materials, equipment, and services and who are in organizations whose leadership wants high levels of competency in those involved in these activities.

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Course Objectives:

In this pre-award procurement and project implementation program, you will learn about the following:

- Understand the phases of project implementation and procurement processes.
- Define project procurement and its role in project management.
- Explore the project procurement process from planning to execution.
- Identify project procurement strategies and their application.
- Develop a project procurement plan tailored to specific needs.
- Learn about types of project procurement and their differences.
- Analyze tools and systems used in project procurement management.
- Explain the pre-award phase of a project or procurement.
- Define the implementation phase within a project's lifecycle.
- Explore significant aspects of procurement implementation planning.
- Gain insights into projects within the context of procurement.
- Comprehend the significance of the implementation phase in project management.

Targeted Competencies:

In this pre-award procurement and project implementation training, the target competencies will learn about:

- Master the phases and strategies of project implementation and procurement.
- Develop skills in creating comprehensive project implementation plans.
- Understand the significance of procurement phases within project management.
- Gain expertise in defining and refining project procurement strategies.
- Acquire proficiency in utilizing project procurement tools and systems.
- Learn to navigate the pre-award phase of subcontracting and procurement.
- Identify and evaluate different types of project procurement methodologies.
- Strengthen knowledge of project procurement processes and their execution.
- Define project procurement and its role in project lifecycle management.
- Enhance competencies in developing tailored project procurement plans.
- Explore real-world projects in the context of procurement and implementation.
- Master critical competencies needed to excel in major procurement initiatives.

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Understanding the Pre-Award Phase:

In the context of a procurement or implementation project, the importance of the pre-award phase of a subcontract/procurement cannot be overstated. During this phase, critical decisions are made regarding the types of project procurement, the development of an effective project procurement plan, and the application of various procurement implementation strategies.

By delineating clear project procurement definitions and understanding the nuances of a project's procurement phase, organizations can set a solid groundwork for the entire project life cycle. We shall explore the phases of the procurement process and highlight essential project procurement tools and systems that support the successful execution of projects in procurement.

Course Content:

Unit 1: Project Definition:

- Scope of Work.
- Work Schedule.
- Cost Estimation.
- Choose the contract price risk you want to take.
- Fixed Price - Lump Sum.
- Fixed Price - Unit Rates.
- Fixed Price - Part Lump Sum and Part Unit Prices.
- Reimbursable Contracts Types.
- Request for Proposals - Beauty Show.
- Open Tender, Limited Tender, or Single Source.
- Company Policy - Impartiality in Bidding and Ethical Standards.
- Planning the Tendering Project.
- Invitation to Prequalify or Register.

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Unit 2: Prequalification Form:

- Tender Package Preparation.
- Technical Bid Documents.
- Key Technical Requirements.
- Handling Scope-Related Risks.
- Tender Package Preparation.
- Commercial Bid Documents.
- Key Contract Provisions.
- Variation Pricing.
- Attached Documents.
- Referenced Documents.

Unit 3: Managing the Bidding Stage:

- Document Delivery.
- Handling Queries.
- Bidder Meetings.
- Site Visits.
- Managing Contacts with Bidders.
- Bid Evaluation.
- Bid Completeness Check.

Unit 4: Implication of Bid Programs, Schedules, Projected Progress and Submissions:

- Handling Bid Reservations
- Alternate Proposals Evaluation and Handling.
- Make Bids Comparable by bringing them to the same basis.
- Bid Clarifications during Evaluation.
- Negotiations during Evaluations.

Unit 5: Award Recommendations:

- Award.
- Letter of Intent.
- Letter to Proceed.
- Letter of Award.
- Bonds and Guarantees.
- Contract Agreement.
- Intimating Unsuccessful Bidders.

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Unit 6: Good Management Practices in IT Tools to:

- Increase Productivity.
- Improve Quality Meeting Real Needs.
- Reducing Costs.
- Implementing E-Tendering.
- Implementing Improvements.

Conclusion:

The course on implementing the pre-award phase of a project or major procurement equips participants with vital knowledge and skills for successful project implementation and procurement management. Throughout this course, attendees comprehensively understand project implementation phases and the procurement process.

Participants in this pre-award procurement and project implementation program will learn to develop effective project implementation plans and procurement strategies tailored to project needs. By exploring various project procurement tools and systems, participants can navigate the complexities of the pre-award phase of subcontracting and procurement.

Moreover, this pre-award procurement and project implementation course fosters a deep understanding of different project procurement methodologies and their practical applications. Ultimately, participants emerge from this course with enhanced competencies in project procurement, ready to contribute effectively to major procurement initiatives within their organizations.