SPECIALIST TRACK: SELLING TO CORPORATE CLIENTS

Bid and onboarding readiness

Lesson: RFPs and vendor onboarding · about 15 minutes

Build the tools you need to choose the right bids and get set up as a vendor quickly.

Your business (name, service, main city):

1. Adapt the go or no-go scorecard for your business: factors, weights and your bid threshold.

2. Score one real or recent opportunity and explain your decision.

3. List the organizations whose bid portals you will register on and the categories you will follow.

4. Check your onboarding file: list each document, whether you have it, and what you need to create.

5. **Write the questions you will ask in a debrief after your next bid, win or lose.**

Check: can you now

- Distinguish an RFI, RFQ, RFP and invitational quote, and know what each asks of you
- Score an opportunity with a go or no-go scorecard before you spend time on it
- Prepare an onboarding file that gets you set up as a vendor within days, not weeks

One change you will make this week