

What I need from you

Prequalification & Framework Applications

This list explains what I need for this service, why I need it and where you can usually find it. Send the information together where practical. Tell me straight away about anything unavailable or urgent. I will confirm when the essential information is complete and the delivery date is fixed.

Essential items are needed before the relevant work can proceed. Important items affect what I can conclude; optional items add useful context. If an item is missing, incomplete, unreadable or a different version from one already sent, identify it by its number and explain what you hold. I will tell you what replacement is needed, why it matters and any effect on the agreed work or date.

1. The application documents in full, with the framework agreement if one is attached

ESSENTIAL

Why I need it. It is the thing being answered, and the agreement is what the rates attach to.

Where you'll find it. The buyer's portal or the invitation email. Download everything, including the appendices nobody opens.

Without it. There is nothing to answer, and any rates would be committed with no sight of what they bind to

2. The submission deadline and the filing route

ESSENTIAL

Why I need it. It is absolute, and the route usually takes longer than anyone allows.

Where you'll find it. The invitation, and the portal itself. Get your own portal login working on day one, not on the last day, and tell me who will be pressing submit.

Without it. There is no date to work back from, and the route is discovered on the last day

3. Accounts, turnover and insurance certificates

ESSENTIAL

Why I need it. Financial and insurance thresholds are pass or fail, and are usually the first filter.

Where you'll find it. Your accountant holds the accounts; your broker holds the certificates. Send the current certificates, not last year's.

Without it. The thresholds cannot be tested, so you may be assembling a submission they cannot pass

4. The project experience you want to put forward

ESSENTIAL

Why I need it. The experience questions usually carry the most marks.

Where you'll find it. Three to six projects, with value, dates, client, and what made each one relevant. Recent and similar beats large and famous.

Without it. There is nothing to select from, and the highest-scoring questions cannot be answered

5. Accreditations and policies held, with certificates

IMPORTANT

Why I need it. They are scored, and an expired one scores nothing.

Where you'll find it. Wherever your certificates live. Check the expiry date on each before sending it.

Without it. Accreditation answers cannot be checked against current certificates, so an expired or unsupported accreditation could be included

6. Your rate or percentage build-up ESSENTIAL

Why I need it. The rates bind for the life of the framework and must come from a real cost base.

Where you'll find it. Your own overhead recovery calculation, or your last set of management accounts if you have never done one. If you have neither, say so and it is built.

Without it. Rates would be submitted from habit or from a competitor's guess, and committed for years

7. The turnover you expect to win through this framework, a year IMPORTANT

Why I need it. The review turns the rate shortfall into money by multiplying it by this figure, and the money figure is what makes the commitment real.

Where you'll find it. Your own forecast of what you expect to win under this framework each year. A range is fine; the calculation is then run at both ends and both are shown. It is your figure and the practice will not estimate it for you.

Without it. The shortfall can be stated only as a percentage, and a percentage is the form of the number nobody acts on

8. Previous submissions to the same buyer IMPORTANT

Why I need it. Consistency is scored, and contradicting your own last submission is costly.

Where you'll find it. Whoever filed the last one. Even an old one helps.

Without it. Answers may contradict what you have previously told this buyer, which is worse than a weak answer

How to send it

Everything to contact@jackbutlerkettle.com. Original files rather than scans of printouts wherever you have them, and forwarded emails rather than text copied out of them, because the dates and the addressees travel with the original and they often turn out to matter.