

Unpacking Competitive Bid Debriefs

A Study of the Value and Process for Providing Debriefs to all Parties

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EXECUTIVE SUMMARY

Every day hundreds of organizations conduct competitive bids to pick the best supplier to meet their needs. Unfortunately, too many organizations fail to properly incorporate a critical component of the bid process – supplier debriefs.

A supplier debrief is a formal (virtual or in-person) meeting with suppliers to help them understand the strengths and weaknesses of their bid.

Debriefs can be done at any down-selection point where the number of suppliers is reduced – but at a minimum should be done shortly after the final supplier selection/award for procurement initiatives where suppliers have spent considerable time, resources and costs participating in a bid process.

Many countries have laws that require supplier debriefs for public procurement initiatives – especially for larger and complex procurements. However, to our knowledge – no country has legislation requiring private sector organizations to do supplier debriefs. Unfortunately, far too many procurement professionals in the private sector believe supplier debriefs are not a valuable use of the buyer's or the supplier's time and don't do them. The logic is that if supplier debriefs are not required by law, why bother to do them? While some private companies do provide supplier debriefs, we often hear from procurement professionals that they don't feel comfortable with the best way to manage the supplier debrief process.

We argue supplier debriefs – both for the winning and losing suppliers – should be considered an essential part of any procurement initiative. This white paper is a collaboration between the University of Tennessee, NEVI (the Dutch Association for Purchasing Management) and the Sourcing Industry Group (SIG) and is provided as an open-source resource to help educate procurement professionals on the why, what, who and how of conducting good supplier debriefs in the private sector.

This paper is segmented into five parts:

- Part 1 **summarizes the research** scope and process used, which involved working with a panel of experts around the world to develop a consensus view of the **what, why, when** and **how** to conduct supplier debrief
- Part 2 seeks to set out a common understanding of **what** a supplier debrief should entail
- Part 3 addresses the question of **why** do supplier debriefs and shares insights into the value of doing debriefs
- Part 4 provides guidance on **who** should get (and conduct) supplier debriefs
- Part 5 is the bulk of the paper and provides lessons learned about **how** to conduct supplier debriefs

We hope this paper will challenge strategic sourcing professionals to embrace supplier debriefs as a positive and essential practice that should be incorporated into competitive bids – especially when the supplier spends significant time, resources or costs in the bid process generating a proposal or solution as part of the bid.



PART 1: ABOUT THE RESEARCH

This paper is the result of a collaboration between the University of Tennessee (UT), NEVI (the Dutch Association for Purchasing Management) and the Sourcing Industry Group (SIG). UT researchers led the primary research on behalf of the three organizations. UT researchers used a Delphi study method involving procurement and supplier experts who participated in over 1,000 competitive bids.

Focus of the Research

The focus of this research was to develop a consensus view of procurement professionals on the what, why, who and how of supplier sectors *in the private sector*.

You might ask – why focus this paper only on the private sector versus creating one paper to serve both the public and private sectors? First, it is important to understand a fundamental difference is that public sector procurement initiatives fall under stringent laws which hold public procurement professionals accountable to prove they have created a fair bid process and expose potential fraud in bid processes. For example, in most jurisdictions, suppliers who do not win a competitive bid are allowed the opportunity to go through a formal protest process to appeal the buyer's decision. The concept of a supplier protest is not something that is required in the private sector.

A second reason is that every country, jurisdiction and government agency has its own unique laws and requirements. For example, the laws in Sweden are different from the laws in the United States. And even within the United States, the laws differ from state to state. As such it would not be feasible to come up with consistent guidelines to align with the public procurement policies across hundreds of counties, states, provinces and government agencies.

While this paper is focused on the private sector – we believe public sector procurement professionals can also benefit. For example, in Part 5 we provide a comprehensive supplier debrief agenda we believe most public sector procurement professionals will find useful. Because this paper is likely to be read by public procurement professionals as well, we call out key differences between public procurement practices and typical public procurement practices where appropriate.

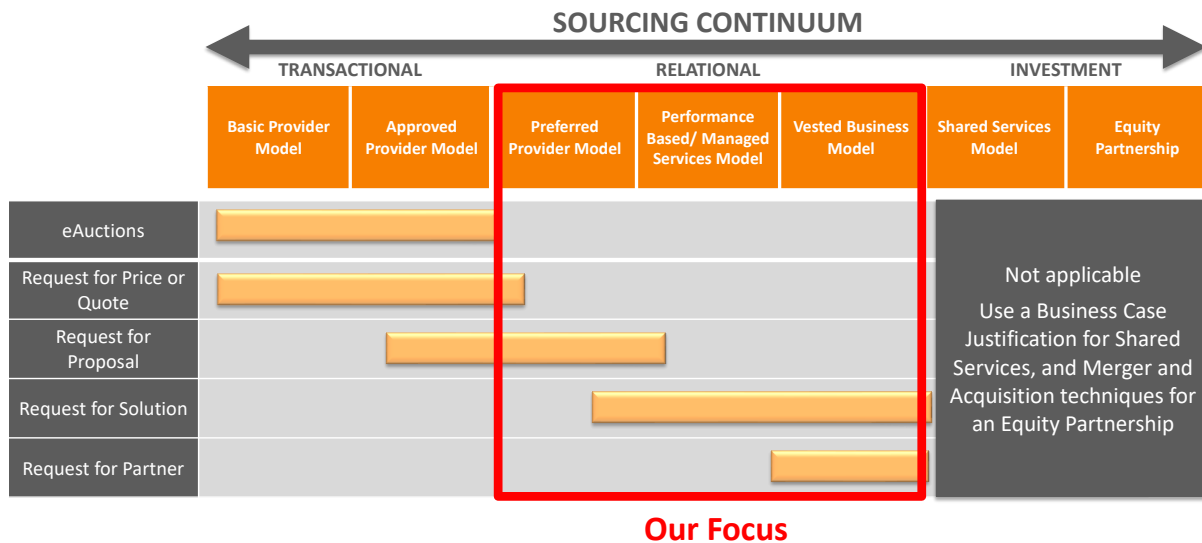
Research Phases

Phase 1 included a literature review to uncover if there were documented best practices around supplier debriefs. While much has been written about public sector debriefs in the public sector where supplier debriefs are mandatory, the literature review was scant regarding supplier debrief best practices in the private sector. What information existed was limited to short articles often in the form of opinion pieces. The lack of findings further supported the need for this paper.

While supplier debriefs can be conducted in any bid process, we have focused this paper on supplier debriefs involving more strategic bidding processes aimed to support Preferred Provider supplier relationships, Performance-Based (aka Managed Services) deals and Vested strategic supplier partnerships (see Figure 1)



Figure 1



The primary reason is that these types of supplier relationships typically call for more involved competitive bid processes such as a Request for Proposal, Request for Solution, or a highly collaborative Request for Partner bidding method. When organizations use these bidding processes the supplier by default typically spends significant resources participating in the bid process where supplier debriefs should be most appropriately used. Suppliers participating in simple Request for Information or a Request for Price/Quote typically do not spend as much resource as these bidding methods are most often used for simple commodity-type scenarios.

Phase 2 involved working with a panel of procurement experts.

The procurement experts included a mix of both “in-house” procurement professionals as well as consultants who often facilitate the bidding process for their clients. These individuals have collectively been involved with over 1,000 competitive bids representing virtually every industry.

As part of Phase 2, the panel of experts was asked to provide feedback about the what, why, who, and how of supplier debriefs in the private sector.

The final part of Phase 2 included sharing the draft paper with business development and sales experts with experience participating in supplier debriefs.

Phase 3 was an interactive process of working with the expert panel to gain consensus on the best practices for conducting supplier debriefs. As part of Phase 3, the expert panelists reviewed this paper for accuracy based on their perspectives.

The publication of this paper concluded at the end of Phase 3.

We consider this paper as open source. We have placed this paper in the Creative Commons and encourage you to share it with your colleagues, suppliers and clients.



PART 2: WHAT

Webster Dictionary defines a debrief as

“to be interrogated for useful information following a mission, experience, etc.”¹

While this may be the technical definition of a debrief, the definition itself may also be a root cause of why so many procurement professionals dread doing supplier debriefs. After all – who wants to be interrogated?

Our research found that one of the main reasons procurement professionals dread doing supplier debriefs because they are uncertain about how to do a good supplier debrief. It is easy to see why there is confusion. First, a simple Google search of supplier debriefs shows the majority of what is found in the public domain relates to public procurement regulations and policies. A deeper investigation then unfolds that there is no standard “best practice,” – with every country, jurisdiction and government agency having different requirements. In addition, many public procurement policies treat supplier debriefs as a formally written justification of why a supplier lost which very much hints at the oh-so-painful definition of a formal interrogation.²

The majority of private sector companies have very different methods of supplier debriefs because supplier debriefs are typically not subject to public procurement laws. The sentiment is often almost one of a laissez-faire attitude that is if not required by law – why do it?

While we cannot influence the literally 100s (or even 1000s) of laws around the world related to public procurement supplier debriefs, we hope we can influence how supplier debriefs are managed in the private sector. In particular – we believe supplier debriefs should not be dreaded – but rather viewed as an essential best practice to incorporate into an organization’s competitive bidding process. Whether you are starting from a laissez-faire mindset or one of dreading the thought of facing losing suppliers – we believe the best way to make the mind shift that supplier debriefs as a productive and essential part of a bid process is to start by understanding exactly what is a good supplier debrief in the private sector.

A good way to understand is to compare what a supplier debrief is with what it is not using Figure 2 on the following page.

In some cases, your competitive bid process may have involved a highly strategic or complex bid process that required significant time, resources and costs from the suppliers. This is especially true when organizations use a Request for Solution or a Request for Partner bid process which incorporates more collaborative aspects into the supplier evaluation (e.g., the European Union’s Competitive Dialogue process). For example, it is not uncommon for a facilities and real estate management supplier to spend \$250,000 participating in a large/global integrated facilities management bid with some of the largest deals costing each supplier over \$1,000,000. It should be noted that the buyer will likely spend similar sums conducting the competitive process as well.



Figure 2: Comparison of What is (vs. is Not) a Supplier Debrief

A Supplier Debrief Is...	A Supplier Debrief Is Not
<ul style="list-style-type: none"> • A formal (virtual or in-person) meeting with suppliers to help them understand the strengths and weaknesses of their bid. • A good debrief: <ul style="list-style-type: none"> • Promotes transparency with losing suppliers to build trust that the competitive bid process and supplier selection were fair and not “rigged” • Includes sharing insights regarding the significant strengths and weaknesses/ deficiencies in the supplier’s proposal/offer – including an anonymous ranking of all bidders against supplier selection criteria¹ • Includes reasonable responses to relevant questions about how the supplier may not have followed the bid process or applicable regulations 	<ul style="list-style-type: none"> • An informal conversation or meeting with a supplier • A good debrief is not: <ul style="list-style-type: none"> • A “point-by-point” comparison of offerors’ proposals • A discussion of other supplier’s trade secrets, privileged or confidential processes and techniques, and commercial and financial information including cost breakdowns, profit, indirect cost rates, and similar information • An opportunity for more senior personnel at the supplier to ‘re-open’ the tender process with an updated offer.

While the table above provides guidance on what a supplier debrief should and should not include, there are variations – especially in what insights are shared. For example, some companies are hesitant to share supplier rankings. While this should not be seen as an absolute requirement, we do want to point out that there is a trend for organizations to include additional information in the supplier debrief. This trend is also true in the public procurement sector. For example, in March 2022 U.S. Department of Defense issued an “enhanced debriefing” requirement that allows suppliers the opportunity to submit additional questions outside of a standard supplier debrief session. In addition, the new regulations require public procurement contracting officers to provide a written “Source Selection Decision Document” and give the supplier a right to request redacted versions of the written source selection decision – not just a mere summary of the decision.³ (This only applies for procurements over \$100 million or over \$10 million for small businesses.)

¹ There was not a consensus decision on if the actual ranking of the suppliers should be shared. The authors believe that is a good practice to share the actual rankings as long as the buyer does not share any confidential information.



PART 3: WHY

You have completed your selection of the successful bidder and are ready to focus your attention on finalizing the contract with your selected provider. But there is one last item to be checked off before you close the door on this phase – you need to offer the suppliers participating in the bid process the option to also participate in a debriefing session.

But why go through the effort? It’s a good question and one that many procurement professionals ask. You’ve already selected your preferred supplier. The popular logic is, “why do I owe the losing supplier the time needed to do a debrief?”

The short answer is that all parties (the buying organization and the suppliers) have spent considerable time and effort in the solicitation process and a good supplier debrief allows all parties to learn from the experience. For the losing suppliers – a supplier debrief helps them improve their competitive performance in future bids. But there are also other reasons why it is wise to do a supplier debrief. For example, sometimes you may not be able to get to a successful contract with the winning suppliers. Doing a supplier debrief can help preserve a good relationship with the unsuccessful bidders and reduces the risk of the unsuccessful supplier not wanting to work with you in the future.

An often-overlooked benefit of providing suppliers the opportunity for a debrief comes from announcing there will be a debrief in the solicitation document and showing where it will occur in the timeline. This encourages participation in the current solicitation process by demonstrating a level playing field for all participants. And – if you ever plan to do future competitive bids – *it can also encourage participation in future opportunities because suppliers feel they were treated fairly and had a chance to understand why they lost.* If they feel they learned why they lost the current bid, they will feel better about putting on extra effort for a future bid.

Our research outlined several benefits of doing supplier debriefs as shown in the table to the right.

Figure 3: Benefits

BENEFITS	
For the Buyer	<ul style="list-style-type: none"> • An opportunity to develop stronger relationships with both the successful bidder and the suppliers who were not selected by showing that the buyer really cares, and is valuable to deal with. • Fosters learning on how to improve in future solicitations based on feedback from the suppliers • Suggests ways of improving communications in the bid process. (e.g., enabling feedback from the suppliers that may not have been clearly understood during the process) • Makes sure best practice and guidance is updated to reflect any relevant issues that have been highlighted • Encourages better bids from those suppliers in future • Helps establish a reputation as a fair, open and ethical buyer with whom suppliers will want to do business in the future.
For the Supplier	<ul style="list-style-type: none"> • Shows thanks to the suppliers, demonstrating that you value the effort they put into their proposal • May help companies to rethink their approach so future bids are more successful • Allows suppliers to learn more about your perceptions of their strengths and weaknesses, ultimately helping them learn how to bid more successfully in the future. • Can also create a more positive perception of the buyer in terms of fairness, and encourage the supplier to participate in future solicitations. • Puts a positive focus on what could otherwise be a negative experience.



PART 4: WHO

A common concern from procurement professionals is that if your bid process includes many suppliers, it will take too much non-value-added time to debrief all of the losing suppliers. This mindset assumes that every supplier participating in a bid should get a debrief. Our research shows a balancing act for deciding who should get supplier debriefs. Rarely do organizations – even governments – debrief every supplier as part of every bid.

So what is the guidance? The answer is “it depends.”

First – and maybe not so obvious – is that you should do supplier debriefs with both the losing and the winning supplier(s). An often-overlooked value stems from debriefing the winning supplier. The primary benefit is an opportunity to step back and pause with the winning supplier as you begin contract negotiations and operationalizing the supplier’s proposal. The provider knows that they won – but they really don’t know exactly *why* they won. The supplier may assume key points in their proposal are strengths and weaknesses, but they do not know for sure until you walk them through their evaluation. Doing a supplier debrief is your chance to review the following with them:

- Areas done very well, to establish expectations
- Areas that could have been improved in their winning proposal, and establish expectations for those areas going forward



A good rule of thumb when deciding which suppliers should get debriefs is the *value* and *complexity* of the procurement. Let’s explore each factor.

Value of the Procurement

A good way to determine if doing a supplier debrief will be a good return on your effort is to sense-check the value of the procurement. While the panel of experts could not agree on a specific rule of thumb to apply for what the value threshold should be, all agreed that organizations should create their own rule of thumb. Figure 4 on the next page shows some public sector benchmarks from lowest to highest.



Figure 4: Benchmarks and Values

Benchmark	Value
UK’s Office of Government Commerce ⁴	Recommended for all bids All suppliers can ask for a standard debrief in contracts that exceed the prescribed EC and World Trade Organization Government Procurement Agreement (GPA) thresholds.
Canada’s Federal Administration Act ⁵	Bids over \$10,000 in value
United States Federal Acquisition Regulation ⁶	All suppliers can ask for a standard debrief Required thresholds vary based on the type of contract. For example, the IDIQ contract threshold is \$5.5m Under the new “enhanced briefing” requirements for small business contractors and nontraditional defense contractors, the threshold is \$10 million and for all other bids, it is over \$100 million.
Dutch Procurement Law	Mandatory for all bids.
Australia ⁷	In addition to losing suppliers getting a debrief, bidders who are not taken into the evaluation stage are provided with justification for why they were not down-selected.

Complexity of the Procurement

Often, competitive bid processes have multiple down-selects where the buyer goes from having a “long list” to a “short list” of suppliers participating in the bid process. While some public procurement policies require debriefs to be offered at both the selection and award stages of the bid process, the consensus from the panel of experts is that you should not do supplier debriefs at the down-select phases if your bid process includes dozens of suppliers.



In bid processes where you have multiple down-selects, a general rule of thumb is to provide supplier debriefs with all “ short-listed suppliers” – typically three to five suppliers.

For example, in a facilities management outsourcing competitive bid, the short-listed suppliers are typically invited to do site visits which incur hard costs for the suppliers. After the site visits, they are often invited to participate in Q&A sessions (sometimes called “yellow pad” sessions) and then their bid team creates the actual bid proposal document.

The logic is simple. Short-listed suppliers will have put significant resources into creating bids for the buying organization as they progress through the bid process. By only doing supplier debriefs with the short-listed suppliers, the buying organization can limit the number of debriefs and still achieve the value described in **Part 1** of this paper.

We address who should be included as attendees in **Part 5 - How**.



PART 5: HOW

The last section of this paper goes into detail on how to conduct supplier debriefs. When it comes to how to conduct supplier debriefs, there are seven elements of a successful supplier debrief process. Sometimes, the recommended approach is the same regardless of which type of bidding process and sourcing business is used. However, in other elements (e.g., time spent with the supplier on the debrief) the rule of thumb for doing supplier debriefs changes based on the type of competitive bid process.

Below we provide general guidelines and recommended rules of thumb for each of the elements.

1. Notifications
2. Location and Timing
3. Amount of Time Spent
4. Ground Rules
5. Attendees
6. Agenda
7. Style

In addition, we provide general tips for planning your supplier debrief at the end of **Part 5**.

Notifications

There are two kinds of supplier debrief notifications as part of a competitive bidding process.

The first type of notification is to incorporate the intent to do a supplier debrief as part of the competitive bid package sent to prospective suppliers. Your bid package should formally note *where* in the competitive bid process you will notify suppliers. Your bid package should also provide the approximate timing for debriefs, set expectations on who will be invited, and outline ground rules such as what will be discussed and what will not be discussed. This notification establishes the buyer's credibility and encourages participation in the solicitation. Simply put, losing suppliers know going in that if they lose, they will at least learn from their effort.

The second type of notification occurs when you issue a formal letter after selection and award. This letter should be issued to all participants thanking them for participating in the bid process and confirming the outcome – if they won or not. This letter should include:

- An offer to participate in a supplier debrief. The offer of a debriefing should set out the scope and format of the debrief. It should also set the expectation the debrief process will not be used to change the selection decision or reopen the award procedure.
- Instructions for the suppliers regarding whom they need to contact for the supplier debrief.
- Indicate the timeframe or schedule when supplier debriefs are conducted.

We recommend this letter be reviewed by your evaluation team and by legal if appropriate to be sure that you do not make promises that the team does not feel they can keep.



We recommend your notification letter to out within 24-48 hours after your supplier decision.



One creative practice we uncovered is to ask all candidates who were not selected if they would wish their names to be passed to successful candidates with a view to their forming sub-contractor relationships. This might be of particular help to Small and Medium Enterprises (SMEs) for example. However, it is essential that this not be construed as a recommendation to form such relationships.



Some expert reviewers suggested a short call or pre-meeting before the formal debrief between a lead buyer representative and a lead supplier representative. This will assist with expectation management and may help the buyer determine who should and shouldn't be present. Ground rules can also be established then and you can determine who will attend.

Location and Timing

As you think about the location and timing for your supplier debrief, it is important to factor in the stage you are in your bid process. For example, if you have a multi-step selection process you may (or may not) offer debriefs at each stage in the process. While some organizations do supplier debriefs after each stage, others opt to do the debriefs at the end of the bid process after the final selection process.

Regardless of your approach, the expert panelists suggest the rules of thumb below for scheduling supplier debriefs.



Rules of thumb regarding the timing for scheduling supplier debriefs:

- Supplier debriefs should be scheduled promptly – preferably within one to two weeks after the supplier has been notified if they have (or have not) been selected as the chosen supplier(s).² This window typically opens immediately upon issuance of the notification. To ensure the buying organization can achieve this timing it is also good practice to include as part of the evaluation process maintaining a record of the potential feedback that would be given. This prevents an additional step of having to recover or recollect the reasons for the decisions made.
- The responsibility to request the supplier debrief meeting falls upon the supplier; if a supplier does not wish to meet, they do not have to.

² If you are doing a multi-phase down selection process and you are not going to do a debrief until after the final supplier selection, you should notify losing suppliers promptly that they will not move forward in the bid process and let them know when the debrief will happen.



- The debrief meetings should be scheduled at the buyer's and supplier's earliest convenience – we recommend within two weeks of notification if possible. This ensures that any debrief information is fresh in everyone's minds.

Supplier debriefs can be conducted as face-to-face or virtual meetings. If they are done face-to-face, they are typically conducted at the buying organization's office. However, realize the suppliers will have already incurred costs in preparing and developing their bid so it can be viewed as a courteous act to give the losing suppliers the option to choose a virtual debrief if desired.

Amount of Time Spent on Supplier Debriefs

The time allocated for supplier debriefs should increase with the amount of time/resources/costs the supplier put into responding to a competitive bid.



While there is no “right” answer – we recommend using these rules of thumb below which align with the type of bid/sourcing model being used in the solicitation:

Figure 5: Amount of Time Allocated

Bid Method	Used for Type of Sourcing Model	Suggested Duration
Request for Proposal	Approved or Preferred Provider	1 hour
Request for Solution	Performance-Based / Managed Services Model	1-2 hours
RFPartner Process	Vested Business Model	2-4 hours (depends on complexity)

Ground Rules

Procurement professionals may feel like doing a supplier debrief is like a balancing act – especially when it comes to debriefing losing suppliers.

On the one hand, there is a need to be transparent and empathetic and to genuinely try to help the losing suppliers improve the next time. Doing so will help strengthen the supply base as many suppliers use the information they learn to invest in areas where they are weak. A losing supplier today may be a winning supplier later.

On the other hand, there is a need not to share suppliers' proprietary information or subject your organization to a supplier protest/lawsuit – something that may open the door to a potential lawsuit due to unfair competition.

We highly recommend you create ground rules for supplier debriefs and include the ground rules when you send out the initial notification. In addition, you should restate the ground rules in the agenda when you schedule the debriefs.



We recommend these rules of thumb as ground rules.

Figure 6: Ground Rules

<p>No debate of results</p>	<p>It should be clear that the debrief process will not be used to change the selection decision or reopen the award procedure.</p> <p>A well-structured competitive bid always includes the evaluation criteria you will use to score the suppliers/bids. Your evaluation team should have used these criteria outlined in your solicitation document.</p> <p>The supplier may disagree, but no response to that disagreement should be promised or provided.</p>
<p>No “point-by-point” comparison of offerors’ proposals</p>	<p>Provide suppliers with their scores and let them know how well, or how poorly, they scored in their evaluation. But do not provide any information on how that performance compared to any other response.</p> <p>In certain situations, especially in government solicitations, the other bids may be public – but even then, any discussion of those bids should be off-limits. If appropriate, share the overall score of the winning bid</p>
<p>No reason to question the validity of the selection process</p>	<p>You gave them the evaluation method in your solicitation document – provide no opportunity to question that process</p>
<p>No confidential information</p>	<p>Never discuss other supplier’s trade secrets, privileged or confidential processes and techniques, or commercial and financial information including cost breakdowns, profit, indirect cost rates, and similar information</p> <ul style="list-style-type: none"> • At all stages, you must avoid revealing anything about other bids where the information is commercially sensitive or has been supplied in confidence. You are merely comparing the supplier's bid to your evaluation criteria not to other bidders. • Where a bid is price-competitive, this should be openly acknowledged, but it must be explained this was outweighed by other factors in the selection/award decision.
<p>No formal records kept</p>	<p>No formal record should be kept of the meeting, but both parties may keep informal notes for their own records.</p>
<p>Names of References</p>	<p>In some cases, the evaluation criteria may include an evaluation of past performance. Do not reveal the names of individuals providing by information about a supplier’s past performance.</p>

Depending on your situation, you may have instances where you have sensitive information. Any sensitive information should be carefully assessed before the meeting to determine whether sharing it is permissible. For example, when the debriefing occurs after the award, some information about the successful candidate can be supplied such as the winning supplier's identity and the contract's value if it is in the public domain.⁸ The decision to share sensitive information will likely depend on the stage of the procurement and the nature of the specific marketplace.



Many procurement professionals feel uncomfortable doing supplier debriefs because of the variability in knowing what information is “right” versus “wrong” to share. We recommend establishing policies/practices/procedures and training to address debriefs. *Your training should factor in the level of detail you should share and should vary based on the type of bid process you use. For example, your approach for doing a supplier debrief for a Request for Proposal for a Preferred Provider will differ from when you are using a Request for Partner to select a strategic partner for a Vested agreement.*



Give yourself ample time to prepare for your supplier debrief. For example, when a weakness is presented, the supplier might have a different view and say that had they known that XYZ was perceived as a weakness, they would have presented additional strengths in their operations in XYZ. Preparation should not be done retroactively after the selection has been done since that would imply you are arbitrarily justifying your decision after it has been made. Instead, your evaluation process should be well documented so that you can point to bid documents and oral presentations as a basis for your decision (even if you may choose not to disclose such specifics).



One creative practice we uncovered is to ask all candidates who were not selected if they would wish their names to be passed to successful candidates with a view to their forming sub-contractor relationships. This might be of particular help to Small and Medium Enterprises (SMEs) for example. However, it is essential that this not be construed as a recommendation to form such relationships.

Attendees

When it comes to the suggested attendees regarding who should participate in a supplier debrief the answer once again is “it depends” and should be based on the nature of the contract; the larger and more complex the competition, the more people you should expect to be involved in the debrief.

Many experts on the panel felt the best approach was to let the supplier decide who should attend. The rationale? Some suppliers will be highly engaged and want to send their entire bid team to participate. And other suppliers may not feel they can benefit from a supplier debrief and may opt-out of participating in a supplier debrief altogether.

The guiding principle should be *who can contribute to the exchange of views and who can do something about taking on board and applying any lessons learned.*



We recommend the following as general rules of thumb:



- Attendance should be kept small, with a rough equivalence of numbers on each side.
- The senior procurement personnel involved in the procurement should chair the debrief session and individuals who conducted the evaluations provide support.
- In procurements that are more technical in nature, it may be helpful if specialists or professional staff are also present; however, entering into technical arguments at this late stage does not add value and is not recommended.
- End-user representation can be included where appropriate – especially in larger procurement efforts.
- Debriefing should never be delegated to staff without the necessary experience or sensitivity to conduct the interview successfully.⁹
- When using a Request for Partner, you should include senior leaders from the buying organization. This is especially true if senior leaders from the supplier will attend.

Some buyers are nervous about having suppliers bring an attorney to the debrief – especially in public procurement initiatives. The fear stems from the perception that the offeror will protest. While protests rarely happen in the private sector we have seen procurement professionals be nervous about having lawyers in the room. Research into the public sector shows that a supplier's decision to bring an attorney to the debriefing does not necessarily signal a difficult conversation. As an assurance and precaution, if the supplier brings a lawyer, the buyer should bring their lawyer.

While we do not recommend lawyers always attend supplier debriefs, we want to highlight that the Department of Defense (DOD) recommends that “the Program Manager and/or Requirements Owner and Legal Counsel should participate in debriefings to offerors.”¹⁰



One way to gain a better understanding of the potential tone of the debriefing is to ask the suppliers to share their list of attendees and relevant titles ahead of the debriefing.



In some cases, the losing supplier may also be a client. For example, consider a large bank that has done a competitive bid for a facilities and real estate management supplier. In this case, you will likely want also to include key individuals that manage the supplier's account.



Agenda

The agenda for the meeting should be provided in the second notification – which is, in essence, the invitation to the meeting. We recommend your Evaluation Team Lead and Legal review this letter before sending it to the supplier.



We have created a sample agenda borrowing heavily from the UK's Office of Government Commerce Supplier Debriefing Guideline and added to with expert panelist insights.¹¹

The agenda includes four primary stages

- Procedural stage
- Debrief Stage/Supplier Assessment
- Supplier Feedback
- Closing Stage

The details of each stage are shared below.

Procedural Stage

The first stage of the meeting is thus largely procedural and should not be interrupted by questions or discussion.

- Welcome (introductions and roles of attendees)
- Share intentions (constructive, improve shared understanding of process and procedures, help each party learn and improve)
- Review of the agenda (stressing you will provide insights into supplier's strengths and weaknesses that can help them improve their bid the next time and that opportunity will be given for supplier to give feedback later in the session)
- Ground rules
 - Reiterate the ground rules you have established and communicated in the notification.
 - Make it clear that the merits of the selection outcome or award are not for discussion but that the intention is to be as frank and open as possible.
 - Confirm the objectives of debriefing should be understood and acknowledged by both parties.
- Description of the selection/evaluation processes
 - The chairperson will set the scene by explaining the background of the selection stage, the evaluation approach, and, in broad terms, the methodology used.
 - S/he will describe the roles involved in selection/evaluation, including approvals and sign-off, to demonstrate that it is an iterative and consensus-based approach.

Debrief Stage/Supplier Assessment

The second stage consists of the actual debrief, concentrating on the strengths and weaknesses of the supplier's bid. The debrief stage should also include ample opportunity for exploring the issues raised by the selection/evaluation criteria if any.

- Outline the size of the field and their relative position



- Describe how the supplier scored against the main criteria (strengths and weaknesses) and explain why the supplier was not selected
- Was their price/pricing model competitive (yes or no – with no detailed comparison)
- Offer constructive criticism if asked, including
 - What the evaluation team liked best
 - Where the proposal could have been improved



Remember that the content of the debrief will vary based on the type of bid process you use. For example, you will be if you used a Request for Partner one of the selection criteria is “cultural fit”. You will need to tailor your debrief to align with the nature of the bid process and selection criteria.



Removing the guesswork by making your feedback as explicit as possible by sharing examples of what the evaluation team liked or did not like about the supplier’s solution. For example, “Your risk assessment was scored low because it lacked (and add detail)”¹²

Supplier Feedback

This portion of the debrief asks the supplier to describe the buyer’s bid process and raise any concerns or questions.

- Any views about the procedure or process?
- Any surprises in the feedback received?
- How could the procurement experience be improved?
- Was the feedback useful?

In addition, several areas are worth exploring to help improve your overall market intelligence and better understand the supplier’s perspective. For example,

- How does a candidate/supplier decide whether to bid?
- How did they put the bid together?
- Were the timescales for response adequate?
- Were candidate/supplier meetings and other presentations helpful?
- What improvements should be made to the procurement process?

Closing Stage

- Closing statement from the supplier
- Closing statement from the buyer – including
 - thanking the supplier for participating in the bid
 - thanking the supplier for their feedback on how you can improve
 - if relevant, inform the supplier of any future procurements that the buyer is planning that the supplier might be interested in



Style

A good supplier debrief creates an environment that is constructive and open rather than defensive.¹³ If possible, the meeting should strike a balance between informality (this is not a formal interview) and practicality (participants will want to refer to notes or other paperwork).

When debriefing, the needs of small or niche suppliers may differ significantly from large consortia or multinationals. Larger suppliers may have considerable experience with different procurement techniques and policies and may be able to offer valuable observations based on this experience. Conversely, small companies may have fresh insights or ask searching questions. Adapt your approach to reflect the interests and needs of the individual(s) you are meeting, but the caution to not share competitive supplier's confidential information.

After The Debrief

A key reason for doing a debrief is to learn from the process. For this reason, the debrief team should take time to record any lessons, either about the information gleaned during the meeting or the process itself. This may take several forms:

- Suggestions for how the buyer can improve the bid process for future sourcing events
- Additions to the list of issues or any register of lessons learned
- Revising best practices or support tools



Our research uncovered a best practice includes issuing a survey to both successful and unsuccessful bidders after the supplier debrief. Doing a follow-up survey allows suppliers the opportunity to provide additional information about their perspectives which they may not have been comfortable sharing in person. The survey can also be sent to more people than just those that participated in the debrief.



SUMMARY

Competitive bid processes are a key part of today's business world. Hundreds of billions of dollars, euros, yen and rupees are awarded to suppliers through a bid process. As part of the process, suppliers spend thousands of hours and sometimes hundreds of thousands of dollars participating in a bid process. Even the simplest bid process takes time and energy from suppliers.

Losing suppliers are left with not just the hard fact that they lost to a competitor but also with questions such as “just why did I lose?” and “was the bid process even fair”?

Supplier debriefs that answer these questions are mandatory in the public procurement sector. However, supplier debriefs are not mandatory in the private sector. The result is that all too often supplier debriefs are not done. Why? Some companies simply don't see it as worth the time. Others dread the thought of facing losing suppliers. Still, others don't even know the why or what of a good supplier debrief process because their companies do not offer guidance.

While we don't believe there should be government regulation, we do believe companies should embrace supplier debriefs as an essential part of every bid process. The benefits far outweigh the time and costs associated with conducting a debrief – which pales in comparison to the time suppliers put into responding to a bid.

A key goal of this paper was to challenge procurement professionals to embrace supplier debriefs as essential as the benefits are well worth the time spent. Benefits include:

- Helps establish a reputation as a fair, open and ethical buyer with whom suppliers will want to do business
- Encourages better bids from those suppliers in future
- Provides an opportunity to develop stronger relationships with both the successful bidder and the suppliers who were not selected by showing that the buyer really cares and is valuable to deal with.
- Fosters learning on how to improve in future solicitations based on feedback from the suppliers
- Suggests ways of improving communications in the bid process. (e.g., enabling feedback from the suppliers that may not have been clearly understood during the process)
- Makes sure best practice and guidance is updated to reflect any relevant issues that have been highlighted

While we highlight the benefits - the real value of this paper is that it serves as a practitioner-friendly go-to-guide procurement professionals can use for conducting supplier debriefs in the private sector – sharing the what, when and how of doing a good supplier debrief. We hope you will take the advice of all of the individuals who provided input into this paper and use the lessons to help you create a sound supplier debriefing process for your organization.

Last, we encourage you to share this paper with your colleagues, suppliers, and clients. This paper - like all of the University of Tennessee “unpacking” white paper topics – is open source and fully sharable.



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The University of Tennessee and the authors want to thank the Sourcing Industry Group and NEVI (the Dutch Association for Purchasing Management) for collaborating on this white paper.

By joining forces, the organizations hope to educate practitioners that it is important that procurement professionals incorporate sound supplier debrief practices into the competitive bid process



The Sourcing Industry Group (SIG) is a membership organization that provides thought leadership and networking opportunities to executives in sourcing, procurement and outsourcing from Fortune 500 and Global 1000 companies. It has served these professionals and opened dialogues with their counterparts in finance, HR, marketing and other business functions throughout its 22-year history.

SIG is acknowledged by many as a world leader in providing “next” practices, innovation and networking opportunities through its: global and regional events, online webinars and teleconferences, member peer connection services, content-rich website and online Resource Center, which was developed by and for professionals in sourcing and outsourcing. The organization is unique because it blends practitioners, service providers and advisory firms in a non-commercial environment.

For more information, visit www.sig.org



NEVI is the Dutch Association for Purchasing Management and was founded in 1956. Since then NEVI has grown to become one of the world’s leading Purchasing Management organizations. NEVI is a member of IFPSM (International Foundation for Purchasing and Supply Management) and chairman of the European division. With over 6.500 members working in the private and public field, NEVI is the world’s third-largest supply management association. NEVI is the principal authority for matters concerning purchasing in the Netherlands and is the leading procurement training & development organization in Europe.

For more information, visit www.nevi.nl



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FOR MORE INFORMATION

The University of Tennessee is highly regarded for its Graduate and Executive Education programs. Ranked #1 in the world in supply chain management research, researchers have authored seven books on the Vested business model and its application in strategic sourcing.



We encourage you to read the books on Vested, which can be found at most online book retailers (e.g., Amazon, Barnes and Noble) or at www.vestedway.com/books.

For those wanting to dig deeper, UT offers a blend of onsite and online courses including a capstone course where individuals get a chance to put the Vested theory into practice. Course content is designed to align to where you are in your journey ranging from Awareness to Mastery. For additional information, visit the University of Tennessee’s website dedicated to the Vested business model at <http://www.vestedway.com/> where you can learn more about our Executive Education courses in the Certified Deal Architect program. You can also visit our research library and download case studies, white papers and resources. For more information, contact kvitasek@utk.edu.



* Prerequisites for *Creating a Vested Agreement* class are:

Five Rules, Is Vested Right?, Getting Ready, and the Vested 3-Day Executive Education Course



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ENDNOTES

¹ <https://www.merriam-webster.com/dictionary/debrief>

² For example, the Dutch regulations (which stem from European Union public procurement directives) provide that the criteria must be objective and must be applied in compliance with the general principles of transparency, non-discrimination and equal treatment, thereby ensuring that all tenders are assessed in conditions of effective competition." (Source: <https://cms.law/en/media/international/files/publications/guides/cms-guide-to-eu-procurement-rules?v=1>). The same source also states (on page 27): "The details vary from Member State to Member State, but the requirements of the Remedies Directives (as amended) are that the letter must include:

— the reasons for any decision to reject a tender on grounds of 'non-equivalence' or its decision that the works, supplies or services proposed do not meet the performance or functional requirements of the authority / utility; or

— where the tender was admissible, the characteristics and relative advantages of the tender selected as well as the name of the successful tenderer; and

— a precise statement of the exact standstill period applicable pursuant to the provisions of the relevant national implementing law."

³ <https://www.natlawreview.com/article/impact-dod-s-enhanced-debriefings-rule-bid-protest-timeliness>

⁴ [https://boa.sd.gov/central-services/procurement-management/docs/OffGovComm\(UK\)Debriefing.pdf](https://boa.sd.gov/central-services/procurement-management/docs/OffGovComm(UK)Debriefing.pdf)

⁵ <https://opo-boa.gc.ca/praapp-prorev/2008-2009/chptr-2-eng.html>

⁶ <https://www.natlawreview.com/article/impact-dod-s-enhanced-debriefings-rule-bid-protest-timeliness>

⁷ <https://www.finance.gov.au/government/procurement/buying-australian-government/providing-feedback>

⁸ [https://boa.sd.gov/central-services/procurement-management/docs/OffGovComm\(UK\)Debriefing.pdf](https://boa.sd.gov/central-services/procurement-management/docs/OffGovComm(UK)Debriefing.pdf)

⁹ IBID

¹⁰ Emily Harman, "Myth-busting" Further Improving Industry Communication with Effective Debriefings, DOSB, <https://www.secnv.navy.mil/smallbusiness/Documents/DACM-Corner-Newsletter-July-2017.pdf>

¹¹ [https://boa.sd.gov/central-services/procurement-management/docs/OffGovComm\(UK\)Debriefing.pdf](https://boa.sd.gov/central-services/procurement-management/docs/OffGovComm(UK)Debriefing.pdf)

¹² Dr. Sara Cullen, "Debriefing the Winner and Loser After a Bidding Process", Enterprise Risk Management & Governance Advisory Service, Executive Update Vol. 5, No. 12, Cutter Consortium, www.cutter.com

¹³ [https://boa.sd.gov/central-services/procurement-management/docs/OffGovComm\(UK\)Debriefing.pdf](https://boa.sd.gov/central-services/procurement-management/docs/OffGovComm(UK)Debriefing.pdf)



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