Writing Technical Specifications and Terms of Reference for Procurement

12 – 16 April 2027
Paris - Right Bank business hotel



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Introduction:

Poor practice in writing technical specifications and terms of reference is a root cause of failed purchases: end-user needs are captured late, requirements copy a preferred brand, scopes of work omit deliverables and acceptance criteria, and evaluators cannot score offers against what was asked. The result is restricted competition, bidder qualifications, variations and disputes after award. This Core Concept course trains the staff who define requirements to write performance, functional and prescriptive specifications and consultancy terms of reference that suppliers can price and evaluators can score. Participants produce a Specification and ToR Pack with a Technical Evaluation Matrix.

Course Objectives:

- Elicit and prioritise end-user requirements into a needs register before any specification is drafted
- Select a performance, functional or prescriptive specification approach suited to the requirement and its supply market
- Write measurable, brand-neutral requirement statements with tolerances, test methods and acceptance criteria
- Structure terms of reference and scopes of work for services and consultancy with deliverables, staffing inputs and service KPIs
- Derive weighted technical evaluation criteria and scoring guidance directly from the specification
- Diagnose specification defects that restrict competition or trigger variations and disputes, and correct them before release

Target Audience:

- Procurement and sourcing staff who turn purchase requisitions into specifications and tender requirements
- Engineers and technical specialists who define equipment, materials and works requirements
- IT and digital staff who specify hardware, software and managed services
- End-user and operations staff who request services and later accept deliverables
- Project staff who commission consultancy and advisory assignments
- Technical evaluation committee members who score offers against published criteria

Course Outline:

Day 1: The Specification in the Purchasing Cycle and Requirement Discovery

- Specification Role Across Need Identification, Sourcing, Contract and Acceptance Stages
- Goods, Works, Services and Consultancy Requirement Types Compared
- End-User Requirement Elicitation Interviews and Workshop Plan
- Stakeholder Needs Register and Must-Have Versus Desirable Prioritisation
- Existing Specification Health Check Against a Defect Checklist

Day 2: Specification Types, Statement Formats and Document Architecture

- Performance, Functional, Prescriptive and Proprietary Specification Types Compared
- Statement of Work, Statement of Objectives and Performance Work Statement Formats
- Specification Document Structure: Definitions, Tolerances, Test Methods and References
- Terms of Reference Architecture: Objectives, Scope, Roles, Schedule and Constraints
- Specification Approach Selection by Supply Market Maturity and Requirement Risk

Day 3: Drafting Measurable Requirements, Deliverables and Acceptance

- Requirement Statement Syntax: Shall, Should and May With Measurable Values
- Neutral Wording Techniques to Replace Brand Names and Single-Source Features
- Deliverables Schedule, Milestones and Consultant Staffing Inputs
- Acceptance Criteria, Inspection and Test Methods for Goods and Services
- Service Level and KPI Definitions With Measurement and Reporting Rules

Day 4: Market Sounding, Technical Evaluation Criteria and Specification Failures

- Request for Information and Market Sounding Questionnaire Design
- Technical Evaluation Criteria and Weightings Derived From the Specification
- Scoring Scales, Pass/Fail Thresholds and Evaluator Guidance Notes
- Technical Clarifications, Deviations and Alternative Offers Handling
- Specification Error Patterns Behind Variations, Claims and Disputes

Day 5: Case Purchase Workshop: Specification and ToR Pack

- Case Purchase Briefing: Laboratory Equipment Supply and IT Advisory Consultancy
- Performance Specification Drafting for the Case Equipment Purchase
- Terms of Reference Drafting for the Case Consultancy Assignment
- Technical Evaluation Matrix Build and Weighting Justification
- Peer Challenge Review of the Specification and ToR Pack

Skills You Will Gain:

- Requirement Elicitation
- Specification Type Selection
- Measurable Requirement Writing
- Brand-Neutral Drafting
- Terms of Reference Structuring
- Acceptance Criteria Design
- Technical Evaluation Weighting
- Specification Defect Diagnosis

Why Attend This Course:

- Return with a Specification and ToR Pack and Technical Evaluation Matrix built on a case purchase and challenged by peers
- Cut bidder clarifications and qualifications by releasing requirements suppliers can price without guessing
- Open competition to more suppliers by removing brand references and single-source features from requirements
- Compare specification practice with peers from engineering, IT, facilities and service buying teams in several sectors

Conclusion:

A purchase can only be as good as the requirement behind it. The course moves from the place of technical specifications in the purchasing cycle and structured requirement discovery, through specification types and terms of reference architecture, to measurable requirement writing, acceptance criteria, service KPIs, market sounding and evaluation criteria derived from the specification. The final day applies these methods to a case purchase, and participants leave with a Specification and ToR Pack and Technical Evaluation Matrix ready for their next requisition.