



Pre-Contract Planning and Readiness Training Course

27 September – 1 October 2027
San Diego



Pre-Contract Planning and Readiness Training Course

Ref: 638_148956 **Date:** 27 September – 1 October 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Pre-Contract Planning and Readiness Training Course is a five-day professional course for procurement, contract, commercial, project, business, finance, risk, legal operations, and technical evaluation functions who leave with a Pre-Contract Readiness File. Participants connect business need, outcomes, scope, requirements, stakeholders, risk, market analysis, contracting strategy, evaluation, governance, approvals, and handover preparation. The course resolves weak early-stage alignment through gated evidence and decisions. Agile Leaders Training Center presents pre-contract readiness as a cross-functional commercial discipline.

Who Should Attend

- Procurement functions responsible for sourcing preparation, market approach, and evaluation planning
- Contract and commercial functions responsible for contracting strategy, allocation, and document readiness
- Project and business functions responsible for need, outcomes, scope, resources, and delivery interfaces
- Finance and risk functions responsible for affordability, assumptions, exposure, and approvals
- Legal operations functions responsible for review coordination, governance evidence, and decision records
- Technical evaluation functions responsible for measurable requirements, criteria, and scoring readiness

The course assumes participants support planned procurements or contracts and leaves out jurisdiction-specific legal advice, live bid evaluation, and post-award administration.

Departments and Industries

The course supports departments and industries that define needs, test delivery options, prepare requirements, and approve contracting routes.

- Procurement, contracts, commercial management, and legal operations
- Project management, finance, risk, strategy, and technical functions
- Construction, engineering, energy, and facilities services
- Technology, telecommunications, and managed services
- Healthcare, transport, manufacturing, and professional services



Learning Objectives

By the end of this course, participants will be able to:

- Analyze business needs, outcomes, and delivery constraints
- Build scope, requirement, and stakeholder controls
- Apply market, risk, and delivery-option assessments
- Use contracting strategy and evaluation planning tools
- Diagnose governance, approval, and document gaps
- Evaluate readiness for solicitation and handover

Course Agenda

Day 1: Need and Outcome Definition

- Business Need Statement Canvas
- Outcome and Benefit Definition Map
- Stakeholder Interest and Authority Matrix
- Delivery Constraint Register
- Pre-Contract Decision Gate

Day 2: Scope and Requirements

- Scope Boundary Definition Sheet
- Requirement Traceability Matrix
- Deliverable and Acceptance Framework
- Assumption and Dependency Log
- Requirement Quality Review Checklist

Day 3: Market, Risk and Strategy

- Market Health and Capability Assessment
- Delivery Model Options Matrix
- Pre-Contract Risk Allocation Register
- Contracting Strategy Decision Grid
- Supplier Due Diligence Plan

Day 4: Evaluation and Governance Readiness

- Evaluation Criteria Design Matrix
- Scoring and Evidence Method
- Commercial Document Readiness Index
- Approval and Assurance Route Map
- Contract Handover Preparation Checklist



Day 5: Pre-Contract Readiness Practice

- Exercise: Validate a Business Need and Outcome Map
- Exercise: Test Scope and Requirement Traceability
- Exercise: Compare Delivery and Contracting Options
- Exercise: Review Evaluation and Approval Readiness
- Capstone Exercise: Pre-Contract Readiness File

Practical Exercises

The course uses suggested activities to apply pre-contract planning and readiness in different procurement settings.

- Suggested activity: define outcomes, stakeholders, and constraints for a managed technology service.
- Suggested activity: test scope boundaries, requirements, deliverables, and acceptance evidence for an engineering package.
- Suggested activity: compare delivery models, market capability, and risk allocation for a facilities service.
- Suggested activity: assess evaluation, approval, documentation, and handover readiness for a professional services requirement.

FAQs

Who suits pre-contract planning and readiness training, and what does it assume?

It suits procurement, contract, commercial, project, business, finance, risk, legal operations, and technical evaluation functions and assumes participants support planned sourcing or contracting work.

How does pre-contract planning differ from tender management training?

Pre-contract planning establishes the need, outcomes, scope, requirements, market approach, risk allocation, strategy, evaluation method, and approvals, while tender management training focuses on issuing documents, handling responses, evaluating bids, and completing award activity.

What should a pre-contract readiness review examine?

A pre-contract readiness review should examine business justification, stakeholder authority, scope, measurable requirements, assumptions, market evidence, delivery options, risk, contracting strategy, evaluation design, governance, approvals, documents, and handover preparation.



Why is market assessment important before contracting?

Market assessment tests whether potential suppliers, capacity, delivery models, commercial conditions, and competitive response can support the intended outcomes before the contracting route and documents are finalized.

How are evaluation criteria prepared before a solicitation?

Evaluation criteria are prepared by linking each criterion to a stated requirement, defining acceptable evidence, setting an evaluation method, assigning governance, testing clarity, and documenting how results will support the award decision.

Conclusion

Participants leave with a Pre-Contract Readiness File containing the need canvas, outcome map, scope sheet, requirement matrix, market assessment, option matrix, risk register, contracting strategy, evaluation design, approval map, and handover checklist. The file replaces untested assumptions with gated evidence. It connects business intent to a contract-ready sourcing decision.