CLIENT ONBOARDING

Client information checklist

One tender or project per enquiry, so the scope, documents and deadline stay clear. *Type or write your answers in the shaded spaces.*

Tell me your name, company, contact details, tender or project and deadline. Use one form per tender or project. Complete the sections that apply and mark anything not relevant as N/A. Please share only information you are authorised to provide. Do not include passwords or portal login credentials. Flag security restrictions or sensitive documents before sharing them so we can agree a suitable transfer method.



01 / Client and organisation details

Registered legal name:
Trading name (if different):
Company number (if applicable):
Website:
Head office or main operating area:
Main services and products:
Approximate number of employees (if known):

/ People involved

Primary contact and role:
Email address and telephone number:
Decision maker or authorised approver (if different from primary contact):
Other people who will provide information or review the bid:

02 / Bid opportunity and contract details

Use the tender pack or buyer notice. Attach the original documents and updates or clarification responses received.

Buyer or contracting authority:
Tender or contract title:
Tender reference number:
Procurement portal and opportunity link:
Service or contract scope:
Delivery locations or regions:
Contract start date and term (include extension periods, if stated):
Submission deadline (date, time and time zone):
Clarification question deadline (if stated):
Site visit, presentation or interview dates (if stated):
Lots or service areas you intend to bid for:

/ Buyer requirements to note

Key buyer requirements, risks or questions

- ☐ Mandatory pass or fail requirements
- ☐ Required accreditations or minimum standards
- ☐ Social value or sustainability requirements
- ☐ Pricing schedule or financial model required
- ☐ Quality and price scoring or evaluation weightings
- ☐ TUPE or workforce information mentioned
- ☐ Required submission format or portal rules
- ☐ Clarifications or addenda issued

Key buyer requirements, risks or questions:

03 / Bid evidence and supporting documents

Tick what you can provide and attach the current version where available. Note missing, expired or renewal documents so we can discuss them.

Tender documents

- ☐ Invitation to Tender and instructions
- ☐ Selection questionnaire, SQ, PSQ or PQQ
- ☐ Draft contract and terms
- ☐ Addenda or updated documents
- ☐ Specification, service brief or contract scope
- ☐ Pricing schedules and rate cards
- ☐ Clarification questions and buyer responses
- ☐ Previous bid response and feedback, if shareable

Company and compliance evidence

- ☐ Company profile and service descriptions
- ☐ COSHH assessments and chemical controls
- ☐ Environmental policy or ISO 14001 evidence
- ☐ Accreditations and memberships
- ☐ Health and safety policy and procedures
- ☐ Quality policy or ISO 9001 evidence
- ☐ Insurance certificates
- ☐ Training, competency and staff records

Performance and supporting examples

- ☐ Relevant contracts or case studies
- ☐ Client references or testimonials
- ☐ Recruitment, vetting or workforce information
- ☐ Supply chain or subcontractor information
- ☐ Performance data, KPIs or service results
- ☐ Mobilisation or continuity plans
- ☐ Equality, diversity or social value evidence
- ☐ Other evidence requested by the buyer

Documents attached or still to follow:

Where the information is held or how it will be shared:

04 / Bid plan and client approvals

Why are you pursuing this opportunity?
Your strongest evidence, experience or differentiators:
What must the bid emphasise?
Known gaps, risks or points that need a decision:
Who will review the draft response?
Who can approve the final content?
Expected review turnaround:
Preferred contact method and suitable meeting times:

No work starts until the support and commercial terms have been agreed. For most projects, the quotation, scope of work and CoreBid Terms & Working Agreement are provided together as one simple document. The final approved / clean version is released once the agreed final payment has been received.