

Tender Questionnaire: Systematic Preparation of Requests

A tender questionnaire is a structured list of questions with which buyers, before or during a request, collect all information relevant to evaluation from suppliers. It ensures that quotations remain comparable, important requirements are not overlooked and the subsequent award decision can be justified in a traceable manner. In practice, the questionnaire forms the backbone of professional tender management, from the technical specification through to contract negotiation. Well designed, it saves time, reduces follow-up queries and significantly improves the quality of supplier meetings.

Key facts

- A tender questionnaire standardises the collection of information from suppliers and makes quotations comparable.
- Typical blocks are master data, technology, quality, logistics, compliance and pricing.
- In practice, a complete questionnaire often comprises 60 to 150 questions, depending on the complexity of the requirement.
- Structured questionnaires shorten the PO cycle time of subsequent processes because follow-up queries and rework decline.
- The questionnaire should be maintained as a reusable template per category and requirement type.
- Answers from the questionnaire provide the basis for the supplier rating model and the award scenario.

Definition: tender questionnaire

A tender questionnaire is a standardised question instrument that buyers use to obtain all decision-relevant information from potential suppliers in a structured manner. It is sent as part of the tender documents or worked through during a supplier meeting and provides the data basis for bid evaluation. Unlike a technical specification, it does not only describe requirements for the product, but primarily requirements for the supplier itself.

Distinction from specification and price enquiry

The specification defines what is to be delivered – material, tolerances, standards, inspections. The questionnaire, by contrast, is addressed to the supplier: capacities, certifications, manufacturing processes, financial stability. For a simple fast-track price enquiry, a shortened questionnaire with a few core questions is often sufficient, whereas strategic tenders require the full scope. The two instruments complement each other: the specification examines the item, the questionnaire examines the supplier behind it.

Position within tender management

In tender management, the questionnaire is the central working tool of the bidding phase. It defines

which answers suppliers must provide so that the buyer can objectively compare quotations and calculate an award scenario. A well-crafted questionnaire reduces the number of follow-up queries, avoids misunderstandings about services and scope, and creates a documented basis that remains robust even when management raises questions or the award decision is reviewed.

Structure and typical question blocks

A practical tender questionnaire follows a fixed logic: first general master data, then technical depth, and finally prices and terms. This sequence corresponds to the natural course of bid evaluation and allows unsuitable suppliers to be filtered out after the first blocks. Standardisation is important, but the questionnaire should be varied by requirement category – a questionnaire for machined parts differs considerably from one for logistics services.

Master data and company information

This block enquires about company data, sites, legal form, order of magnitude of revenue, employee numbers and references. Typical questions concern the number of production sites, export shares and existing supply relationships with comparable customers. Important are the questions about insurance cover (liability, product liability) and about financial ratios such as the equity ratio, which in practice is often assessed as a benchmark value across risk tiers. Many companies use discrete answer levels here instead of exact figures in order to lower the completion barrier.

Technology, manufacturing and quality

This covers machinery, manufacturing processes, capacities, inspection and measuring equipment and certifications such as ISO 9001 or IATF 16949. For technical parts, questions on process capability indices, first article inspection, documentation and the handling of engineering changes belong here. Sustainability aspects are also increasingly anchored at this point, for example the Product Environmental Footprint (PEF) for product-related environmental information or questions on recycled content. The answers from this block often later feed into the supplier rating model.

Logistics, terms and compliance

The final block clarifies delivery times, minimum order quantities, transport concepts and logistics costs, such as Incoterms, packaging requirements and willingness to enter into consignment or stocking arrangements. For raw material-dependent products, questions on price formation belong here, for example how an alloy surcharge for metal alloys is calculated and itemised. Compliance questions on export control, compliance policies and occupational safety round off the questionnaire. Pricing – such as prescribing a cost breakdown – must necessarily be included here so that quotations are genuinely comparable.

Methods and approach for creating a questionnaire

A good questionnaire does not come about spontaneously, but from a well-prepared purchasing process. The prerequisite is a clearly defined market model: who are the potential suppliers, what is the supply situation, which levers exist? On this basis, the questionnaire is tailored specifically to the requirement, whereby a purchasing policy can stipulate from which order value which questionnaire depth is mandatory.

Analyse requirements and prioritise questions

First, the requirement should be described precisely, ideally together with the engineering and quality departments. For extensive requirements, demand pooling is recommended in order to bring higher volumes and thus better negotiating positions into the tender. Every question should serve a clear purpose: either as a knock-out criterion, an evaluation criterion or a basis for negotiation. Questions with no discernible benefit are removed – overly long questionnaires reduce the response rate and answer quality in practice.

Choosing question formats and answer types

A mixture of closed questions (yes/no, multiple-choice levels), numerical values and limited free-text fields has proven effective. Closed questions can be automatically converted into scoring matrices and are quick for the supplier to answer. Free text should only be used where differentiated explanations are genuinely necessary, for example for deviations from the specification. It is important to anticipate unwanted answers: a question about shift operation should specifically ask whether two- or three-shift production is possible, not whether "flexible working hours" exist.

Communication and process control

With the dispatch of the questionnaire, an active steering phase begins: deadlines are communicated, follow-up queries are bundled and answers are distributed to all participants to ensure equal treatment. Missing answers belong in a defined escalation process before the bid deadline expires. Once the answers have been received, evaluation follows, often supplemented by a supplier meeting in which open points are explored verbally. The evaluation results flow into the final award scenario.

Key KPIs relating to the questionnaire

The quality of a questionnaire can be measured: via the response rate, the completeness of the answers and the subsequent process speed. These metrics make tender management controllable and show where templates need to be improved.

Response and completeness rate

The response rate indicates how many of those contacted answer the questionnaire by the deadline. Values below around 70 per cent suggest that the questionnaire is too long, too complex or that the target group has been chosen incorrectly. The completeness rate measures the proportion of correctly answered questions per response; frequent gaps in the same blocks show that questions are unclearly formulated or sensitive and need to be revised.

Process and responsiveness metrics

Beyond the tender phase, questionnaire quality also affects downstream procurement: the more complete the information, the more smoothly the period from purchase order to confirmation, known as PO cycle time, runs. A plan-actual inventory comparison at suppliers with stocking potential shows whether the information on inventory strategies was realistic. The number of follow-up requests after award – such as certificates submitted late – is also a good quality indicator for the questionnaire.

Risks and controls

Questionnaires are not an end in themselves: flawed or incomplete questionnaires distort the evaluation and can ultimately lead to wrong supplier decisions. There are also legal framework conditions that must

be observed.

Typical sources of error

Common problems are leading questions, unclear evaluation rules and questionnaires that have not been updated for years. Discriminatory or superfluous questions deter good suppliers and can even create formal defects in public procurement. A further risk is the handling of confidential information: competitors among the bidders must not be able to draw conclusions about other parties' prices or terms. Finally, there is a risk of wrong decisions if answers are adopted unchecked rather than verified through audits or reference visits.

Controls and legal notes

Proven controls include the four-eyes principle in evaluation, documented scoring matrices and a traceable escalation process in the event of discrepancies. For competition law topics – such as most-favoured-customer clauses or background competition provisions in the contract – the design should be legally reviewed; this does not replace legal advice in individual cases. A purchasing policy should stipulate who approves questionnaires, how supplier data is stored and from which order values additional committees are to be involved.

Dealing with strategic suppliers

With strategic partners or dual sourcing concepts, the questionnaire is also a relationship instrument: it signals professionalism and serious intent. Here it is worth using the answers not only for selection but for joint development – for example capacity planning in the supplier network or safeguards in consumption-based replenishment. Those who regard the questionnaire as a dialogue format receive significantly better and more honest answers in practice.

Current developments: digitalisation and AI in procurement

Questionnaires are increasingly moving into digital platforms that automatically evaluate answers and match them with supplier master data. This is changing the role of the questionnaire from a static document to a living data source in the supplier network.

Automated evaluation and AI

Modern systems convert answers directly into evaluation scores and flag deviations from requirements. AI in procurement additionally supports the formulation of questions, the analysis of free-text answers and the merging with data from the supplier rating model or ongoing supplier assessments. The buyer remains the decision-maker, but receives a significantly faster data basis. Verification remains important: automatically generated evaluations can contain systematic biases and must be checked from a professional standpoint.

Template management and reuse

More and more purchasing departments maintain category-specific questionnaire templates centrally, for example for machining, castings, electronics or logistics. After each tender, new insights are fed back into the template, so that the questionnaire improves with every use. This continuous improvement typically reduces the effort per tender considerably and also makes simple fast-track price enquiry variants consistent. For suppliers, the completion effort decreases when questionnaires are comparably structured across platform standards.

Typical metrics

Response rate: > 80%

Proportion of questionnaires answered by the deadline; lower values indicate template problems

Completeness rate: > 95%

Proportion of correctly answered questions per response

Follow-up requests after award: < 5%

Frequent follow-up requests indicate gaps in the questionnaire

PO cycle time: typically 1–3 days

Complete information shortens the period from purchase order to confirmation

Practical example

A medium-sized mechanical engineering company had previously awarded milled parts ad hoc via telephone enquiries. After repeated supply difficulties, the purchasing department introduced a category-specific tender questionnaire and first pooled the annual demand of several sites. The questionnaire comprised around 80 questions on capacities, process capability, certifications, delivery times and price structure. The answers enabled a clean award scenario with two suppliers and subsequently dual sourcing for risk diversification.

- Demand pooling across three sites in order to offer an attractive total volume
- Questionnaire with mandatory questions on IATF certification, capacity reserves and first article inspection
- Scoring matrix with weighted criteria and a documented escalation process for incomplete answers
- Verification of key information through a supplier meeting and plant tours at the finalists

Conclusion

A professionally created tender questionnaire is one of the most effective tools in strategic procurement. It standardises the collection of information, makes quotations objectively comparable and forms the basis for robust award decisions. Decisive factors are clear question wording, a clean separation of knock-out and evaluation criteria and regular maintenance of the questionnaire templates. Those who additionally evaluate the questionnaire digitally and link it with supplier ratings reduce effort and error rates permanently. The one-off creation effort therefore pays off several times over across many tenders.

Frequently asked questions

What belongs in a tender questionnaire?

Typical blocks include company master data, manufacturing technology and capacities, quality management and certifications, logistics and delivery terms, pricing and compliance. Every question should serve either as a knock-out criterion, an evaluation criterion or a basis for negotiation. Questions with no discernible evaluation benefit should be removed so as not to jeopardise the response rate.

How many questions should a tender questionnaire contain?

In practice, depending on complexity, 60 to 150 questions have proven effective. Simple requirements such as a fast-track price enquiry can get by with considerably fewer, strategic tenders with considerably more. More important than the number is that every question has a clear purpose and that the answers

can be evaluated.

What is the difference between a questionnaire and a specification?

The specification describes the requirements for the product or service – material, standards, tolerances, inspections. The questionnaire is addressed to the supplier and enquires about their capabilities, capacities, certifications and terms. The two documents complement each other and belong together in professional tenders.

How do you evaluate the answers from a questionnaire?

A scoring matrix with weighted categories has proven effective, into which the answers – preferably as closed answers or numerical values – are converted. The weighting should be fixed before the questionnaire is sent out in order to avoid manipulation. Open points are subsequently explored in a supplier meeting before the award scenario is drawn up.

May I ask suppliers any number of questions?

Legally, the principle of proportionality applies: questions must relate to the service and must not disadvantage suppliers inappropriately, which is examined particularly strictly in public procurement. Even in the private sector, excessive questioning can act as a deterrent and touch upon data that is sensitive under competition law. The concrete design should, if in doubt, be legally reviewed.

How often should a tender questionnaire be updated?

In practice, an annual review of the category templates has proven effective, as well as an adjustment after every major tender once new insights have been gained. New topics such as sustainability requirements or digitalisation questions should be added promptly. Version-controlled template management ensures that all buyers work with the current version.