

SOCIAL TRADERS

SOCIAL PROCUREMENT CHECKLIST

Use this tool to understand what you need for your social enterprise to:

1. Start doing social procurement
2. Win more work (if you're already doing social procurement)

SOCIAL TRADERS SOCIAL PROCUREMENT CHECKLIST

Category	Check	Things to consider
<input type="checkbox"/> ST Certification	You are ST Certified.	<p>Social Traders certification confirms a social enterprise has been verified by Social Traders.</p> <p>Various stakeholders, including government and other businesses, rely on third party certification when they work with social enterprises. It's how they can manage the risks of suppliers misrepresenting themselves as social enterprises.</p> <p>There are market advantages for social enterprises and so there is an increased significance in legitimate use of the label.</p> <p>Learn more about ST Certification here. →</p>
<input type="checkbox"/> Experience	You have a track record in providing your product or service to other businesses.	<p>This demonstrates you have customers and a market for your product or service, as well as the experience and capability to deliver B2B contracts.</p> <p>Use customer references and testimonials to reduce buyers' perception of risk.</p> <p>If you are a small to medium sized enterprise (SME), demonstrate your experience and capability by highlighting key customers and the types of work you do for them.</p> <p>If you are a startup, demonstrate your capability by highlighting the founder's past experience and transferable skills relevant to the new enterprise.</p>
<input type="checkbox"/> Team	You have robust governance and a skilled team around you.	<p>This could take many forms, such as a board of advisors and a diverse team with the skills and business acumen necessary to win and deliver contracts.</p>
<input type="checkbox"/> Contract Capability	You have a good understanding of the minimum and maximum contract sizes you are able and willing to take on and deliver successfully.	<p>Your previous experience and the contract sizes that you have successfully delivered in the past is a good guide. Inability to deliver to the required standards because you were over-ambitious can limit your future contract prospects.</p> <p>Be realistic about the size of contract you are able to deliver as this gives potential buyers an idea of your scale and where you might fit into the tiers of their supply chain (many opportunities lie within tiers two-four).</p> <p>If your organisation is too small to take on certain contracts, consider collaborations with other social enterprises or commercial suppliers. Social Traders can provide introductions to relevant SEs.</p>
<input type="checkbox"/> Insurance	You have appropriate insurance policies in place.	<p>Insurance, such as public liability and professional indemnity insurance, is an important risk consideration for buyers and can even be a requirement that needs to be fulfilled before entering into a procurement process.</p>

Category	Check	Things to consider
<p>☐ Accreditation, memberships and licences</p>	<p>You hold the accreditations, certifications, licences and memberships reasonably required (or expected) for the industry you operate in and for your product/service.</p>	<p>For example:</p> <ul style="list-style-type: none"> • many buyers expect or look favourably upon suppliers that meet recognised standards, e.g. • ISO90001 Quality Management • AS/NZS 4801 OH&S Certification, etc. • if you are a catering company, you must comply with food safety legislation, etc.
<p>☐ Marketing</p>	<p>You are visible and have a professional online presence.</p>	<p>Your ST Portal profile and website are often the first place prospective buyers will look. Both should be kept up to date, look professional, and make it easy for buyers to understand what you do.</p> <p>If your social enterprise (SE) is part of a bigger NFP organisation, it is highly recommended that the SE has a separate website, or at least ensure that the SE webpages are easy to navigate from the main homepage.</p> <p>Demonstrate your capability on your website by articulating your strengths. Include logos of your customers and accreditations (including the ST certification logomark). Also ensure that your social purpose is clearly articulated on your website.</p> <p>Google is the most used tool to find suppliers in procurement. Ensure your website is search engine optimised (SEO) so that it appears in searches.</p> <p>Research your competitors (not just other SEs), how do they present themselves online (website & social media)?</p>
<p>☐ Business development</p>	<p>You have a dedicated business development resource.</p>	<p>Having business development (BD) expertise within your social enterprise is important if you are looking to grow through social procurement.</p> <p>BD can help your enterprise grow by building strategic relationships, reaching new customers, and/or entering into new markets.</p> <p>The ability to think strategically and commercially, as well as foster relationships, are key aspects of BD.</p>

Category	Check	Things to consider
<p>☐ Pitch</p>	<p>You have a well-rehearsed, clear, concise 90-second elevator pitch on your SE.</p>	<p>Your pitch should be clear, concise and appeal to a customer's strongest decision-making drivers (which are normally commercial drivers, not impact drivers).</p> <p>This means you need to find a balance between communicating what you sell and your impact. The first questions buyers have in their mind is “do you sell a product or service that I can buy and do you have the capability to deliver?” You should spend at least 60 second discussing what you sell and demonstrating capability through current customers/contracts, and less than 30 seconds discussing your impact.</p> <p>Be clear on your value proposition- what your SE has to offer a customer that no other competitor can, and how your product/service fulfils a need that no other competitor is able to fill (this means you need to have researched your competitors well, and not just other SEs).</p> <p>Tailor your pitch every time, to ensure relevance to the audience. Buyers are time poor and will disengage if you waffle on or talk about things that are not directly relevant to them. Remember that you are targeting business/government buyers, so omit any mention of products/services for individual consumers.</p> <p>Practice, practice, practice. Seek feedback from a diverse range of people. Video yourself and watch it back.</p>
<p>☐ Preparation</p>	<p>You have information and documents ready to go.</p>	<p>It is a good idea to prepare a range of information to ensure you are ready for procurement processes:</p> <ul style="list-style-type: none"> • Product or service descriptions and pricing • A description of your organisation and its work (including key strengths) • Referees, such as current and previous customers • Membership certificates, licences and accreditations (including evidence) • Insurance information (certificates and policy evidence) • Contract capability and track record • Team capability and experience (and CVs of key staff) • Case studies (including your stories of impact) • Impact measurements and evidence of outcomes • Your 90 second elevator pitch
<p>☐ Stay informed and active</p>	<p>You are abreast of procurement opportunities and are actively networking.</p>	<p>Identify potential customers (ST business and government members are a good start) and research their procurement process.</p> <p>Which procurement platform do they use? Ensure you register on them (this may mean numerous different platform registrations). Can you sign up for their tender notification emails?</p> <p>Keep track of upcoming government opportunities by signing up for notifications on your state government’s procurement website.</p> <p>Use LinkedIn to find and contact relevant procurement people in target customer organisations.</p> <p>Keep up to date with Social Traders’ e-newsletter to identify relevant networking events, procurement related training workshops & opportunities for your SE.</p>

SOCIAL TRADERS

We help social enterprises grow through social procurement

Social Traders offers a range of growth services to help our certified social enterprises win more work from our growing community of business and government buyers.

[Learn more →](#)

