Global Engineering Conglomerate improves Pre-Tendering process through Automation

Background

Diversified High-tech Heavy Engineering Project Execution company with a strong Engineering and Project Management and Manufacturing infrastructure to undertake Projects and supply of machinery and equipment in the fields of Nuclear Power, Aerospace, Defence, Steam Generation plants, Independent Power Projects, Turnkey Cement Plants, EPC Projects for Mineral Processing Bulk Material Handling for Heavy processes, Industrial, Planetary and Marine Gearboxes, Turnkey Sugar Projects.

Situation

Marketing departments of this company have to respond to various floated tenders and received tender queries. In response to tender, they create quotation which is a time critical and intensive process requiring collaborations, insights, knowledge and expertise of various departments. Manual administered process is costly to manage, difficult to track and often result in errors. Automated process can drastically improve current scenario and enhance the efficiency and improve the productivity of various departments.

Solution

The Solution had to be designed that each aspect of Human Intervention is Seamlessly Automated with Ideal Conditions in place. In other words a Workflow System to Record and Retrieve Information of the Complete Tender Process.

The Business Analysis Team before Devising the Solution had an understanding of the various departments, users, their roles and list out finer details of their responsibility to chalk a Work flow of the Tasks Users undertake and their value addition in the entire process.
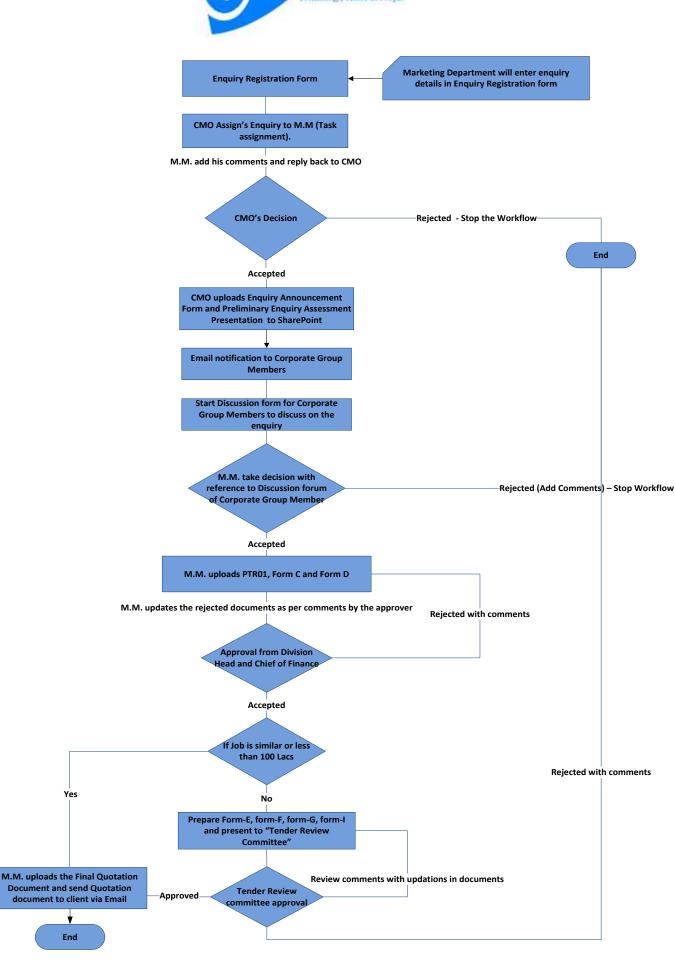
A complete process and the flow that was automated over Microsoft SharePoint 2013 being depicted in flow diagram below; some of the key points to note are also mentioned underneath:

1. Quotation Workflow solution begins with Enquiry Registration form which would comprise of requisite fields to capture all the information pertaining to the floated tender like tender party name, tender amount, tender floating date, tender last date etc.
2. Marketing Department shall only have access and permissions to the Enquiry Registration form.
3. CMO have the flexibility to further assign the tender enquiry to various Marketing Managers to study the feasibility and organization's capabilities to go ahead with tender.
4. Task would be created and appropriate alerts will sent to concerned Marketing Manager requesting him/her to take the suitable action.
5. Provision should be made to add Marketing manager's comments and further attach or upload documents to support his feasibility study.

6. CMO will be owner for all the tenders and would take the decision either to proceed further with tender or reject the tender.

Enquiry Registration Form

Marketing Department will enter enquiry details in Enquiry Registration form

CMO Assign's Enquiry to M.M (Task assignment).

M.M. add his comments and reply back to CMO

CMO's Decision

Rejected - Stop the Workflow

End

Accepted

CMO uploads Enquiry Announcement Form and Preliminary Enquiry Assessment Presentation to SharePoint

Email notification to Corporate Group Members

Start Discussion form for Corporate Group Members to discuss on the enquiry

M.M. take decision with reference to Discussion forum of Corporate Group Member

Rejected (Add Comments) – Stop Workflow

Accepted

M.M. uploads PTR01, Form C and Form D

M.M. updates the rejected documents as per comments by the approver

Rejected with comments

Approval from Division Head and Chief of Finance

Accepted

If Job is similar or less than 100 Lacs

Rejected with comments

Yes

No

Prepare Form-E, form-F, form-G, form-I and present to "Tender Review Committee"

M.M. uploads the Final Quotation Document and send Quotation document to client via Email

Review comments with updations in documents

Tender Review committee approval

Approved

End

7. A tender, if rejected would be halted and all the action taken prior to rejection and audit trail till the rejection would be available for visibility in the tender.

8. If CMO approves the study and decides to proceed with tender, he/she shall upload the dully filled necessary documents like Enquiry Announcement Form and Preliminary Enquiry Assessment Presentation into the SharePoint environment.

9. Flexibility shall be provided to add different Approvers to take suitable decision for the different uploaded documents.

10. E Mail alerts and notifications would be sent to Corporate Group Members consisting of MD, CEO, CFO, Sr. President (Commercial), President (Projects), and President (Strategic Planning), for their assessment.

11. Tasks won't be created for Corporate Group Members, rather a discussion forum would be made available to Corporate Group members to discuss amongst themselves and provide their remarks and feedback pertaining to the tender.

12. Marketing Manager shall refer to the remarks/comments provided by Corporate Group Members in the discussion forum and shall take the decision either to proceed with tender or reject.

13. If Marketing Manager wishes to proceed further, he/she shall upload dully filled requisite documents (PTR 01, Form C and Form D) required further into the SharePoint environment.

14. A provision will be made to add the Approvers to take suitable decision for the uploaded documents.

15. Approvers (Division Head and Chief of Finance) shall either approve / reject the documents uploaded by the Marketing Manager.

16. Different authorised users can see the status (approve/reject) of the various documents by different approvers with their feedbacks/comments.

17. Different documents rejected by various approvers would be sent by the Marketing Manager for modification/rework.

18. An email alert/notification would be provided to Marketing Manager requesting him/her to either work on further documents like Form E, Form F, Form G, Form I and Presentation for review committee or sent the Quotation to the Customer depending upon the condition like job/tender type and tender amount.

19. Depending upon the tender/job type and tender amount the Marketing Manager shall sent the prepared Quotation to customer via e mail or shall make a preparation before Review Committee consisting of MD,CFO, Senior President(Commercial), President(Projects) and President(Materials).

20. CMO will arrange to send the Quotation after approval of Tender Review Committee via e mail client.

21. Tender, if rejected would be halted and all the actions taken prior to rejection and audit trail till the rejection would be available for visibility in the tender.

22. A document once approved/rejected at any given stage can't be deleted by any users (uploader /owner) of the system.

23. In case of Parallel Approvals of document, rejection at any given stage by either of the Approvers would be deemed to be a 'Rejection'.

Broad level Actions:

1. **Submit:** Submit at any given step refers to the uploading a document or adding comments/feedbacks or activity into the SharePoint environment.

2. **Accept**: Accept at any given step refers to the in agreement with enquiry/document/feedback/comments.

3. **Reject**: Rejection stated in the above broadly comprises of two types.

4. **Rejection at Document level:** A document rejected by any approver would be available to the document up loader/owner for modifications/rework based on their feedback/comment.
5. **Rejection at Workflow/decision level:** Rejection at workflow would result in termination of the process. Audit trail and actions prior to rejections would be available.
6. **Cancel:** Cancel at any given step refers to the terminating of the current activity/action

Benefits

- ✓ Smooth automation of existing manual process.
- ✓ Streamlined operations for a more productive workforce.
- ✓ Cut inefficiencies and bottlenecks.
- ✓ Reliable and efficient process tracking and audit trail.

Technology & Development Methodology Used

- **Technology:** Microsoft SharePoint 2013
- **Development Methodology:** SCRUM

About People's Technology Resource

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