

PTL 7.0 Bid Preparation and Submittal

- Consult with a client on their actual needs based on plans / specs sent, clarify details, and suggest better solutions and add-ons where applicable.
- Confirm that we have the most up-to-date information about who is in charge of each of the project's skill-requirements. Identify all locations for our product, and create a line-by-line proposal to meet the client's needs. This may also include different solutions for the same area (Alternate Proposal) and suggested add-on's (Optional Proposal).
- Obtain all contacts who are involved with the project with whom we will need to communicate during the bidding process
- Go over the proposal with the decision-maker, clarifying each line item, any suggested alterations or deviations to the plan/specs, and make sure all proposal points are understood.
- Send a proposal which has been revised to all applicable contacts via email, fax, or mail, to confirm receipt, and to set a follow-up appointment with the decision-maker to go over the proposal changes.
- Go over the re-bid proposal with the decision-maker, clarifying each altered line item, and any other alterations or deviations, to make sure they are fully understood.

