

PTL 7.0 Bid Preparation and Submittal

Objective

Put together an estimate (bid) for the job. Take off all stone products that the customer wants, detail how to produce these with our profiles and units and price them for the customer, then correct any issues until the customer approves the complete bid.

Procedure

1. Examine the plans carefully for any cast or cut stone required for the project
2. Take off all products we will produce if the bid is won.
3. Convert all units to linear feet and prepare a line item estimate for the customer.
4. Price the parts and units the customer's plans call for. Prepare a line item estimate for the customer.
5. Send the bid to the customer, and his selected agents and champions, and consult with them to be sure the bid is exactly what they want.
6. Correct the bid until it matches the customer's requirements and he returns the signed bid.

Key Points

- Be sure you have the correct architectural features that the customer wants
- Discuss the options with the customer and ask questions about his needs
- Carefully consider the customer's budget, and consult with them about how to meet the projects budget.
You may try to get the customer to adjust his designs to allow you to better fit our product line to his budget, by suggesting standard molds rather than custom parts and profiles.
- You can suggest stone that the customer didn't request, if it seems they may not have considered our product for that usage.
Be sure they are willing to reconsider the suggested new stone before spending a lot of time estimating it.



When we prepare a bid we create the Stone Legends version of this project. We examine the plans carefully, and determine where the plans require stone, and where we can suggest adding stone that isn't specifically requested. You should consult with the customer before adding units to the bid, you cannot be sure what they have considered.

Contacting the customer or his selected agents and champions during this phase is very important. Often the plans do not specify everything we need in exact detail, so there will be room for interpretation, and the only correct interpretation is the customer's. He get what he wants, but he may not know what he wants, particularly to the level of detail we need to be able to produce. The customer may be always right, but he may not be knowledgeable, so be in regular contact throughout the bidding process.

PTL Outline

PTL 5: Qualify Project Contacts

PTL 6: Evaluate Project

- PTL 6.1 Get Plans
- PTL 6.2 Evaluate Plans
- PTL 6.3 Plan Follow-up

PTL 7: Bid Preparation and Submittal

- PTL 7.1 Pre-Bid Consultation
 - PTL 7.1.1 Provide Job References
- PTL 7.2 Prepare Bid (Sales Call)
- PTL 7.3 Other Bid Contacts
- PTL 7.4 Submit Bid
- PTL 7.5 Bid Submittal Follow-Up
- PTL 7.6 Submit Rebid
- PTL 7.7 Rebid Submittal Follow-Up

PTL 8: Convert Bid to Job

PTL 9.0 Job Number Assignment

