Dynamics Tender Management

for Microsoft Dynamics 365 for Customer Engagement

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Orchestrate Winning Tenders that can be managed and carried out ***with Flexible Workflows***

1 *Introducing* Dynamics Tender Management

Every tendering process is a combination of stakeholder, risk and project management, and the complexity of these processes are growing. Dynamics Tender Management provides you with a firm grasp on your bidding, procurement and tender processes with accurate reporting.

Compared to standard sales processes, tender management requires a different approach. From registering multiple or alternative proposals to a single opportunity or project, you are faced with the challenge of accurately reporting what's in your pipeline or forecasting, as you do not want to double count all outstanding proposals. You need to obtain connected, real-time insights into the overall process, including sub works or projects with improved cost control, whilst allocating resources more effectively. With tender management, multiple supplier and partner documents need to be managed by email or file-sharing platforms. With document management, as part of your overall tender management process, your sales team will be well informed of all the steps in a project. Our integrated approach avoids having to switch from one system to another, saving valuable time whilst providing accurate version control.

Benefits

- Easily manage multiple opportunities
- Improve win ratio and increase project profitability
- Lower project risk
- Simplify stakeholder management
- Improve document control and compliance
- Increase pipeline and booking accuracy
- Speed up approvals processes

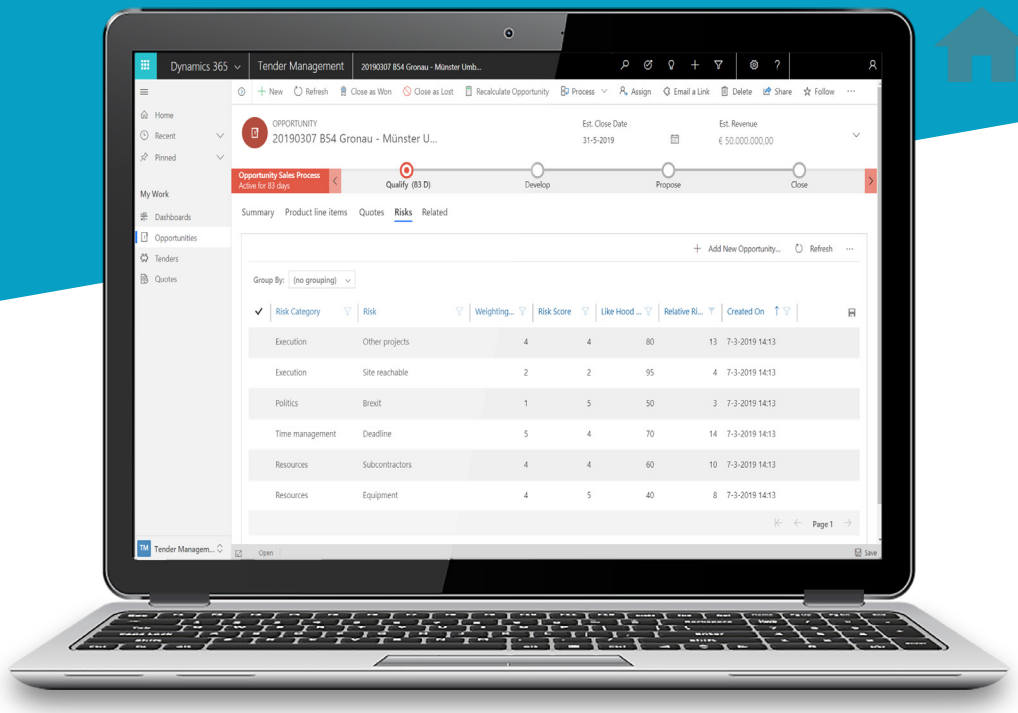
2 Integrated *Tender Process*

The lead and opportunity functionality within Dynamics 365 for Customer Engagement monitors the commercial tendering phase. The corresponding business process flows and Stage Gate processes can be made specific, according to the individual Project Risk Category, ensuring that the correct business flows containing mandatory field are triggered. If a Project Category should change during the tender process, the corresponding business process will also be updated.

Categories can be easily set up in order to gain deep insight into the various risk groups. When creating a new opportunity or quote, previously defined risks can be copied or cloned, so that you always have a check-list available to hand. After a lead is marked as qualified by a pre-qualification team, it becomes a real opportunity. By qualifying, all data will move from a lead to the new opportunity and as a result the tender team has a quick start with the information that is already compiled and available. Data is entered once and enriched during the process, making staff more efficient whilst enjoying an integrated, user-friendly approach.

When using Microsoft Dynamics 365 for Project Service Automation to register and report on budget and actual costs, you will also experience the ultimate way to connect the acquisition, tendering and realization process to project control. Opportunities are used for acquisition, qualification and monitoring the commercial process and Projects are used for calculations or budgets, optimal use of resources and registering hours to report on the cost of sales.

3 Improved *Risk Management*



Projects are becoming increasingly complex and the demands regarding quality, sustainability and inconvenience during implementation are becoming increasingly higher. Macroeconomic aspects like political developments, boycotts or changing trade agreements, can follow on from each other at a pace.

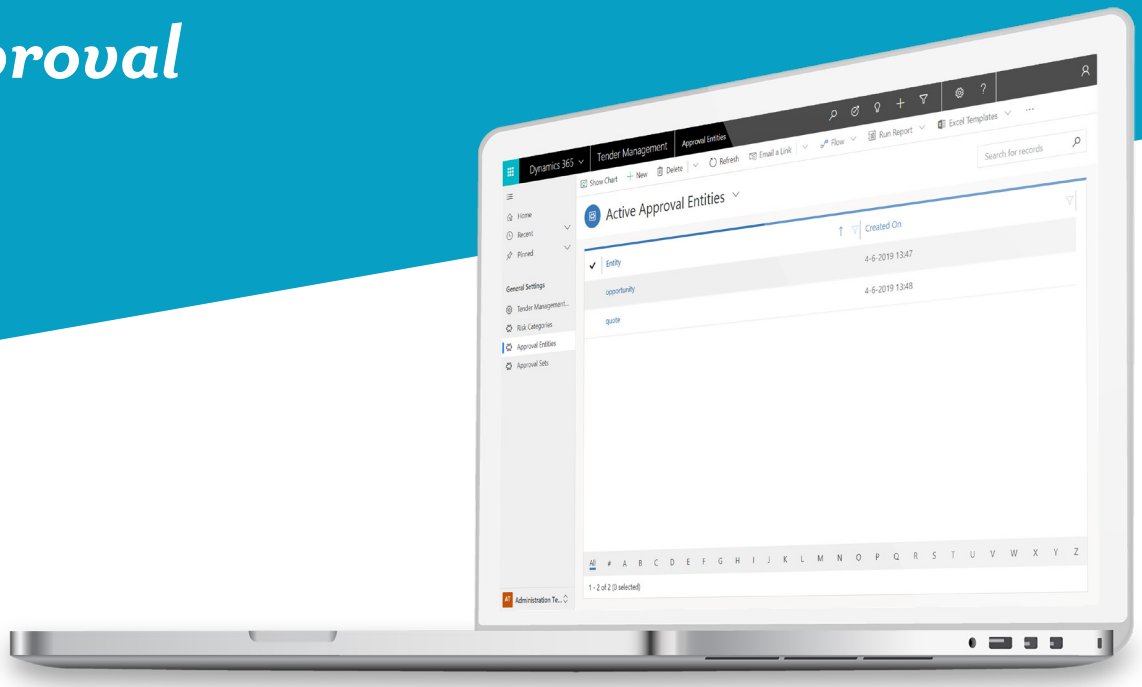
When a quote is accepted by an opportunity, the next stage in the process is a project. Executing projects is not always easy. Before, during, and after the execution, many risks can influence the financial results or, for example, harm employees. For this reason, it is wise to identify and evaluate risks before sending a quote to a potential customer.

By using project categories that automatically trigger a defined business process flow, the Tender Approach, we have created a meticulous risk assessment model without the need for custom script or code.

Using a risk-based assessment for opportunities, tenders, and projects should be a priority to increase effective decision-making. When registering and monitoring potential risks is time intensive, the use of appropriate tooling to support risk management scoring is the right choice.

Create *Accurate Forecast Reports, Speed Up Approvals* and *Increase Win Rate*

4 Enhanced *Approval Control*



Stage-Gate processes are often a fundamental part of the commercial decision-making process that needs to be highly aligned with risk categorization and the corresponding Tender Approach. By using Dynamics Tender Management with Dynamics 365 for Customer Engagement, and benefiting from extensive approval matrices with automated notifications, you can quickly obtain information regarding who needs to approve what, at which moment, and under which conditions in a process.

In order to move to the next phase, many approvals may be required following the qualification of a tender opportunity. Most large projects involve complex calculations, which make it challenging for senior management or legal departments to view, understand, and sign-off. This can result in delays, lost time, and money. Often specific software solutions are used to create quotations. Microsoft Dynamics 365 for Customer Engagement can manage the connection with such software, ensuring all parties get access to the right information, helping them to make a more informed decision about signing-off a quotation.

Because Dynamics Tender Management is fully integrated into Microsoft Dynamics 365 for Customer Engagement, it can help businesses make better decisions about each contract. The benefit of this is less risk, an increased level of awarded contracts, and ultimately a more customer-centric approach to projects.

5 *Multiple Opportunity* Handling

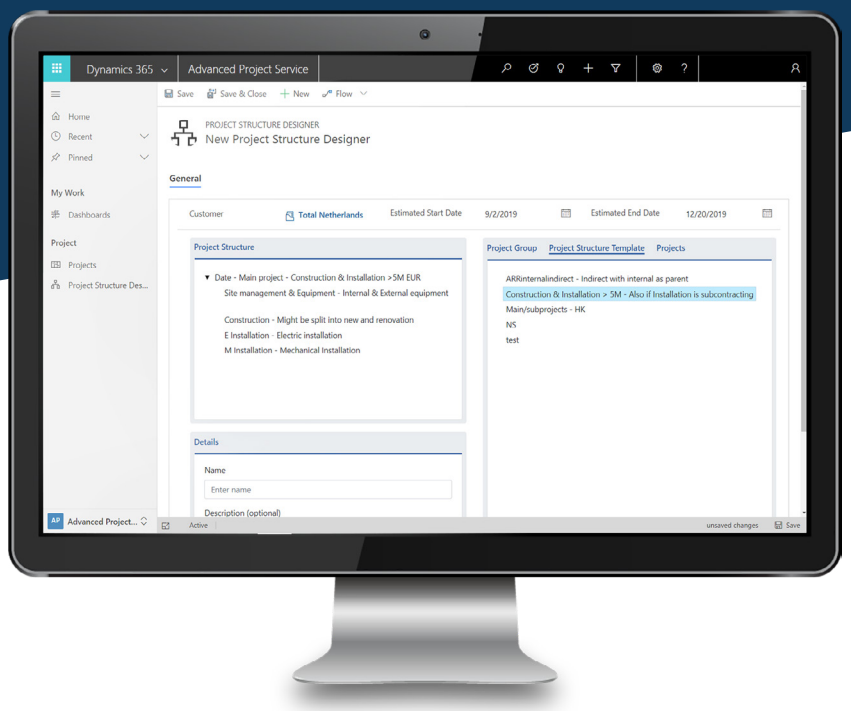
Along with managing stakeholders, including government agencies, construction firms, architects and design companies, multiple opportunity management can also be a challenging part of the tender management process.

With our additional tender management functionality integrated right into your Microsoft Dynamics 365 for Customer Engagement environment, you can clearly identify individual demand and avoid the risk of double or triple counting one product or service being sold in the same project.

Integration of systems also helps to deal with an important factor in tendering: meeting the deadline. Organizations often struggle with deadlines and should always be prepared with trained and available resources, equipped with adequate tooling, to handle urgencies regarding bid preparation and timely submission.

Easily ***Manage Multiple Opportunities*** and ***Simplify Stakeholder Management***

6 Quotations & Projects

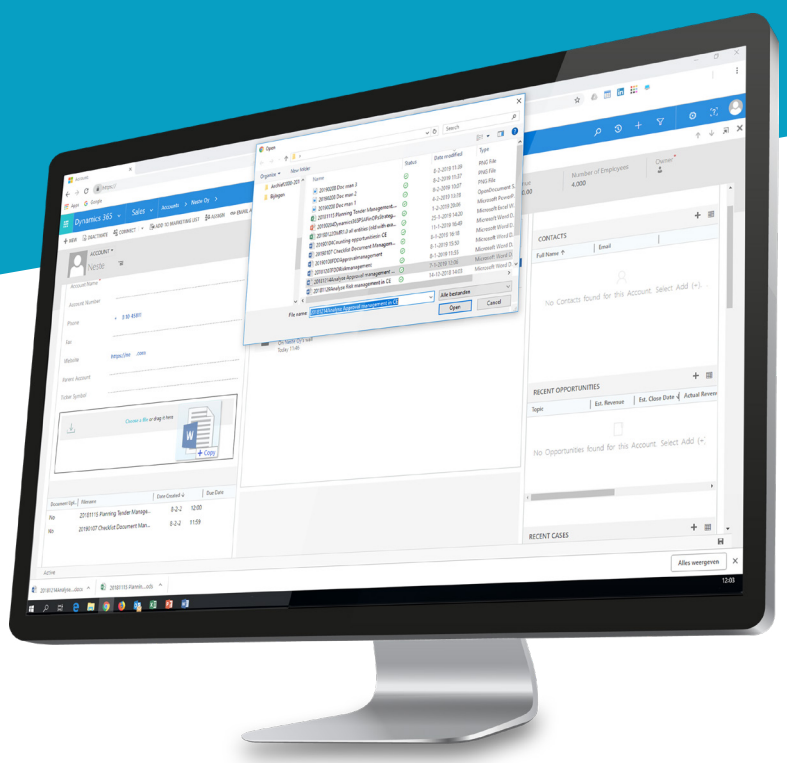


Opportunities and Quotes can be used just once but may also be used in more complex situations. It might be that you offer your potential customer different alternatives where they can choose between one or more options.

Most installation companies work as subcontractors. The main contract is between the principal customer and the main contractor, but subcontractors will execute many parts of the project, for instance, electrical installation, security systems, drywalling or painting. Several main contractors offer responses to the tender and every main contractor asks for quotes for parts of the project from sub-contractors. The project will be executed only once. In the sales funnel, there should be only one amount forecast. For this reason, it is possible to add more than one potential customer to one opportunity or tender.

Most big projects are separated into main and sub-projects. For example, a new building will be built and after completion, the existing building will be renovated. Another example is a project that is divided into phases or into disciplines like electrical and mechanical installation. In Dynamics Tender Management, such phases or disciplines can be stored in templates using a Project Structure Designer where totals are added to the project card so that the total cost for a project is always directly visible.

7 Document Management



Microsoft Dynamics 365 for Customer Engagement comes with a standard integration to SharePoint Online, but when it comes to ease of use or a structured way of securing documents, the standard integration is often not sufficient for Stage-Gate Document Control.

When combining Dynamics Tender Management with Dynamics Document Manager, you will be able to save documents in secure SharePoint Online locations together with Dynamics 365 for Customer Engagement attribute values for quick and easy retrieval.

Dynamics Document Manager also moves documents to Microsoft SharePoint Online, freeing up valuable space in your Dynamics 365 data storage. Documents are replaced with links inside Dynamics 365, so users enjoy the same experience when accessing their files directly.

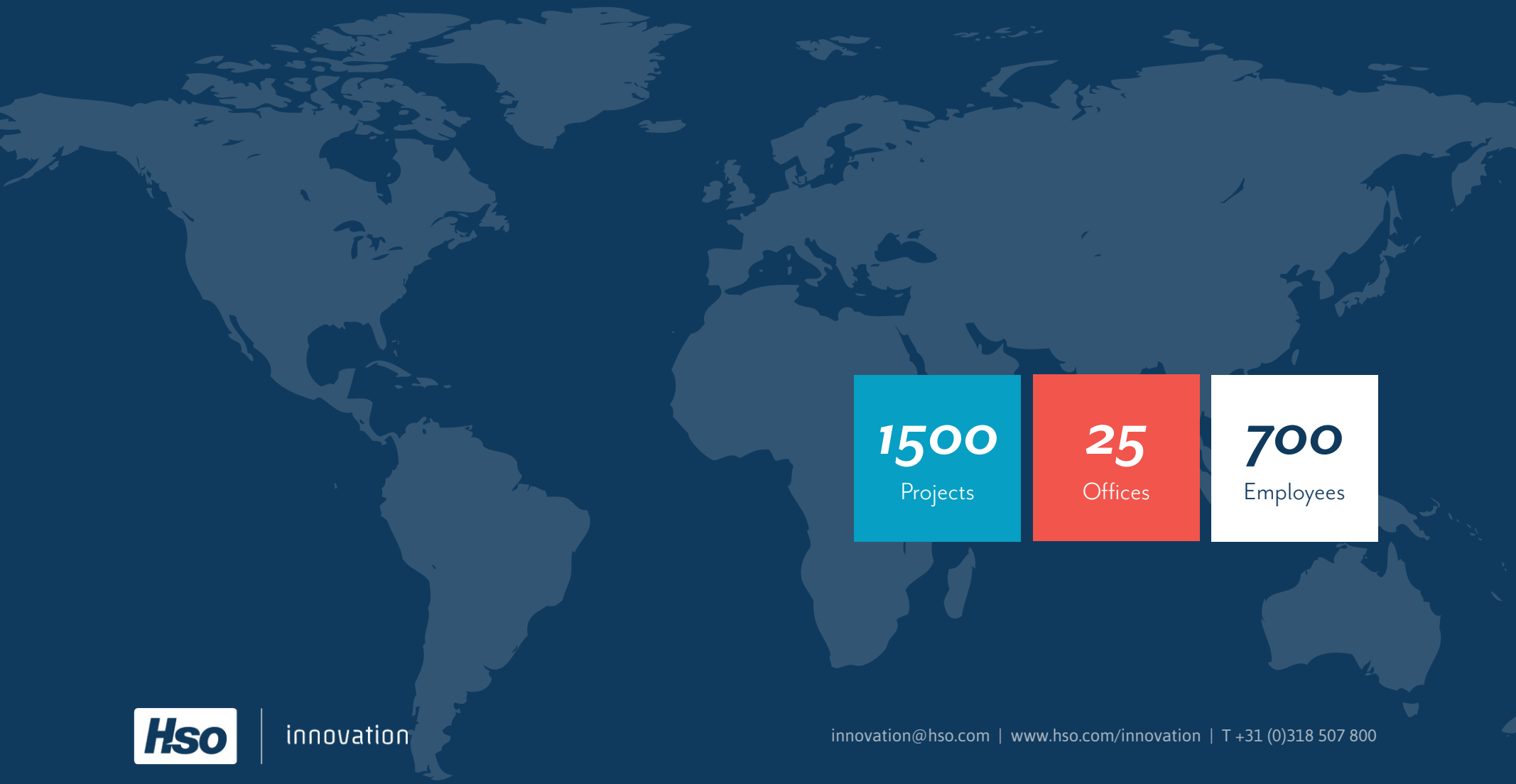
You can manage your document security level and define SharePoint structured document repository rights from within Dynamics 365. The Dynamics 365 Business Unit can be used to apply security settings directly to the document or its folder in SharePoint Online so that only appropriately authorized employees have access to these documents.

Want to know more?

Our Dynamics Apps are sold, implemented and supported worldwide by our industry experts and strategic partners. We are happy to advise you which solution or technology is the best fit for your specific needs.

Contact HSO Innovation

T +31 (0)318 507 800
innovation@hso.com
www.hso.com/innovation



1500
Projects

25
Offices

700
Employees

Hso | innovation

innovation@hso.com | www.hso.com/innovation | T +31 (0)318 507 800

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