Using Kahootz for Procurement - Sellers

Graham Smith - 2018-07-11 - Getting Started Guides & Manuals

From a sellers perspective, different organisations will approach procurement in different ways depending on the size of their organisation, the size of the project being bid for, how many bids are made per month and so on. This variety means that a "one size fits all" procurement solution doesn't suit anyone. Many clients have found that the flexibility in Kahootz means they can adapt and purpose the system to suit their own ways of working, rather than having to adapt themselves to a software process.

With this in mind, here are a few different ideas that might be useful in your bidding process - they may not suit everyone, but you can adopt and adapt the ideas that might suit you.

- Library of standard included documents
- Database of standard question and model answers
- Bid submissions to-do lists
- Organising your submissions

Library of standard included documents

You may have a set of standardised documents that often get included in your bids - insurance information, standards certification, professional body membership etc. Why not have a folder of them so all people who are preparing bids know where they are and can access the latest version?

Moving beyond file sharing, Kahootz allows you to put timed tasks on the documents so you can also get automatic reminders to renew and update any important certificates.

Why do this?

- Saves team members time trying to find the latest certificate.
- Reminds you when it needs to be reviewed.
- Makes sure the document is up-to-date.

Database of standard question and model answers

If your organisation responds to "Invitation to Tender" type documents which ask a series of questions about your products or services you'll probably have found that the same questions come up each time. Rather than re-answering those each time, why not create a database to store those common questions, and your best answers, to save time when filling in new tenders?

Your database can include as much as you want - just the questions and answers, or if you want you can add columns for who last updated that answer, notes about variations, details of which of your products have an answer applies to, and much more. Your answers can either be as plain text or use our formatted text column, so you can use bold text and bullet points as well.

Why do this?

- The full text is searchable.
- Saves time.
- Improves quality and consistency by using the best answer each time.

Bid submission to-do lists

For each project you are bidding for, you could create a quick Task List in Kahootz to jot down and track all of the things that need to be completed before submission of a bid. E.g. Fill in the document, find the certificate,

get a detailed technical answer on Q7, ask a manager to sign the document off, etc.

Why do this?

- Checks that you are doing everything you need to.
- Everyone can see the tasks that need to be done.
- If relevant, tasks can be assigned to individuals or sets of people, and given deadlines.

Organising your submissions

There are two ways you can organise your submissions. You can either have a single workspace that includes one folder for each bid, or you can have a separate workspace for each bid. So, when should you use one folder or one workspace per submission? This is dependant on a variety of factors that are specific to your way of working.

A single workspace, with one folder for each bid, works well if:

- The same staff are involved in all bids.
- Each bid is relatively easy to complete - days or weeks rather than several man-months.
- You're doing a relatively high number of bids per month.
- You can search for phrases in all your bids in one go.

Separate workspaces for each bid works well if:

- Different people get involved in different bids - either from a sales side or technical.
- Your bids are complex and take a lot of staff time to compile.
- You're bidding for a small number of high-value projects.

You can, of course, use a mix - a single workspace for small bids and then adding additional workspaces for specific major tenders.