

Using Kahootz for Procurement - Buyers

Software Support - 2019-04-04 - Getting Started Guides & Manuals

Who's this article for?

This article is aimed at those wanting to setup a Kahootz site for a procurement exercise, from the point of view of the BUYER (the people running the procurement exercise). It is based on a common procurement exercise where you have a specification for what you want to buy, and a set of firms/organisations bidding to supply that. One or many stages may be involved with the number of bidders passing through each stage potentially decreasing to a final selection of one, and the final contractual arrangements with them.

What's Important?

- Equality - Particularly in the public sector, it is important to be open and fair to all your bidders, providing a clear and level playing field for them to operate on as possible. Being seen to be fair will create a good relationship with your bidders.
- Clarity - Access to information for bidders should be easy to avoid any misunderstandings.
- Security - It is important that information about one bidder and their submission is not accidentally made available to any other bidders. This certainly applies to actual bids, but may even apply to the names and identities of other bidders in some situations. Mistakes in this can be fatal to the project.

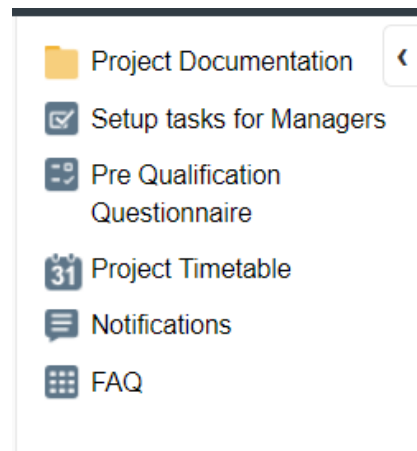
To send information to the bidders:

We suggest creating one "All Bidders" workspace, with the procurement team as managers and staff from ALL the bidders as members. This workspace should be used for communications from you to the buyers, but not back from them. This means that all bidders get the exact same information through the same place.

Kahootz has a pre-prepared Workspace Template available for this (unless disabled by your site owner). This template includes:

- The membership list is hidden from other members.
- All content only creatable and editable by managers.
- Discussion forum for notifications set to manager-only posting.
- Pre-Qualification survey template, empty but set not to share responses with other members.

The template also includes a task list for managers to guide you through a set of actions to configure the workspace for your specific project - adding and deleting things from our suggestions to make it match your requirements, utilising the configurability of Kahootz.



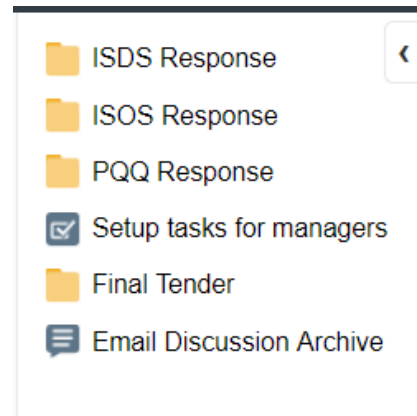
To receive information from the bidders:

Create one "Single Bidder" workspace for each of your bidders. That can be used for communication (emails, formal submissions etc.) from the bidder to you, the buyer. Having this in a separate workspaces means you can have a good "air gap" of security between the workspaces. There's no danger that misplaced permissions will mean a bidder uploads his submissions for other bidders to see, as only his colleagues and you will be members of his workspace (as opposed to trying to manage that in the "All Bidders" area).

Again, Kahootz sites have a workspace template for this (unless disabled by your site owner). You can create a workspace from this for each of your bidders, using their names to indicate which workspace is which. (Some procurement teams use numbers or letters to indicate bidders to increase the anonymity). This template includes:

- Open Membership list - it'll just be you and staff from one bidding company (or consortium, etc.).
- Members can create and submit content in certain places - you can change this during the bid phases of you want.
- Open discussion forum.
- Pre-Qualification Survey template, empty but set not to share responses with other members.

There's a special setup actions task list in this template too. In general, your communications about the project will go out through the "All Bidders" workspace. Any questions for clarification from each bidder can come back through their own individual workspaces. You can either answer there if it's specific to that bidder, or if you want to provide the answer to everybody, you can use the "All Bidders" workspace - either by sending messages to the notification Forum, or using our Frequently Asked Questions clarification database if you like that route.



That's not quite how you work

Not every procurement exercise is the same, in fact, none of the procurement exercises we've seen run through Kahootz are identical! With Kahootz you have the ability to customise your workspaces and use a variety of different approaches to fit those workspaces to what you need, not change your process to some "one size fits all" software.

You could:

- Have open pre-engagement discussions with prospective bidders, either individually or together, to inform what's sensible to put in your bid documents
- Provide tasks to bidders so they've got a tick-list of things they need to submit.
- Or ensure they're submitting everything you need through questions in a survey.
- Create additional workspaces for your internal working on the procurement team,
 - or to engage other colleagues on preparing sections of the specification
 - or to work with colleagues on evaluating the bids - potentially with scoring surveys or spreadsheets
- Gradually turn the winning bidders workspace from a bid space into the location for final contractual negotiations and on into a project management space for the delivery.

So why not give it a go?