

A wide-angle photograph of a busy shipping port. In the foreground, there are stacks of colorful intermodal containers in shades of red, blue, green, and white. In the background, several large green gantry cranes are visible against a clear blue sky. The water of the port is visible in the lower portion of the image.

Leading shipping company adopts a **SharePoint** based **bid management** platform to automate the process.

Client Business Description

Our client is one of the leading integrated, full-service maritime yards located in MENA region. They focus on building ships, offshore vessels, rigs, platforms. Additionally, the yard helps to the repair & maintain these vessels.

Challenges

They had several cases where they needed to award construction & repair contract to third-party vendors. The client used an outdated tendering process to award these new contracts. Because of the technological limitations, the process was time-intensive and cumbersome. The system had several challenges:

- They created RFPs with future bid open and close date.
- When bid opened, access the client's employees were not able to access the information. Similarly, after bidding closed, the bidders were denied access. Only those in the organization could access the system. The process was manually controlled and cumbersome.
- The system was unsecured and relied heavily on paper copies. Bid documents could be stolen or manipulated in the wrong hands.
- Email invitations sent to bidders using the previous system were not customizable.

How We Helped

To overcome the shortcomings of the manual bidding system – the client wanted to use SharePoint lists to automate this business process. However, they were not sure how to implement this solution. They had more than 250 users for Office 365 in the company.

They approached our **Beyond Intranet SharePoint experts** for help developing a **fully automated bid Management solution**. We understood how the current client workflow utilized a manual bidding process. We turned their workflow into a custom digital solution. A common SharePoint platform was created where the Bid or proposal owners, reviewer team, and external users (Bidders)- could collaborate seamlessly and complete the bidding process.

The automated process included the following workflow:



1. Bid Project Form

Created a Bid project form with predefined fields like:

- Bid project title
- Bid description
- Start date and time
- Bid close date and time
- Project members
- Internal employees
- Attachments
- Type

2. Add External Users

Another challenge we solved was successfully inviting external or non Share Point users for bidding. The project owner was able to add as many bidders as needed and send invites



3. Bid Document Access

Bidders received automatic access to designated folders as soon as the bid opened and automatically denied access to the organization members.

4. Email Notifications

SharePoint allows us to send emails at various trigger points, but these emails are not customizable. As per the client's need, we prepared custom email templates at various trigger points which gave more information to the recipients. Custom emails are sent when any bid starts or is about to close. Reminder emails are sent to bidders before the bid is about to close.

Emails are also sent to the bid evaluation team as soon as Bid is closed, and the evaluation team gets access to documents.



5. Bid Evaluation Process

With a high level of security involved in the bidding process, we created a condition in the bid evaluation process. The technical team is required to evaluate the documents first and after they give approval, the Commercial team can access them.

Also, the system does not allow opening the Bid documents without valid authentication by all the members of the evaluation team.

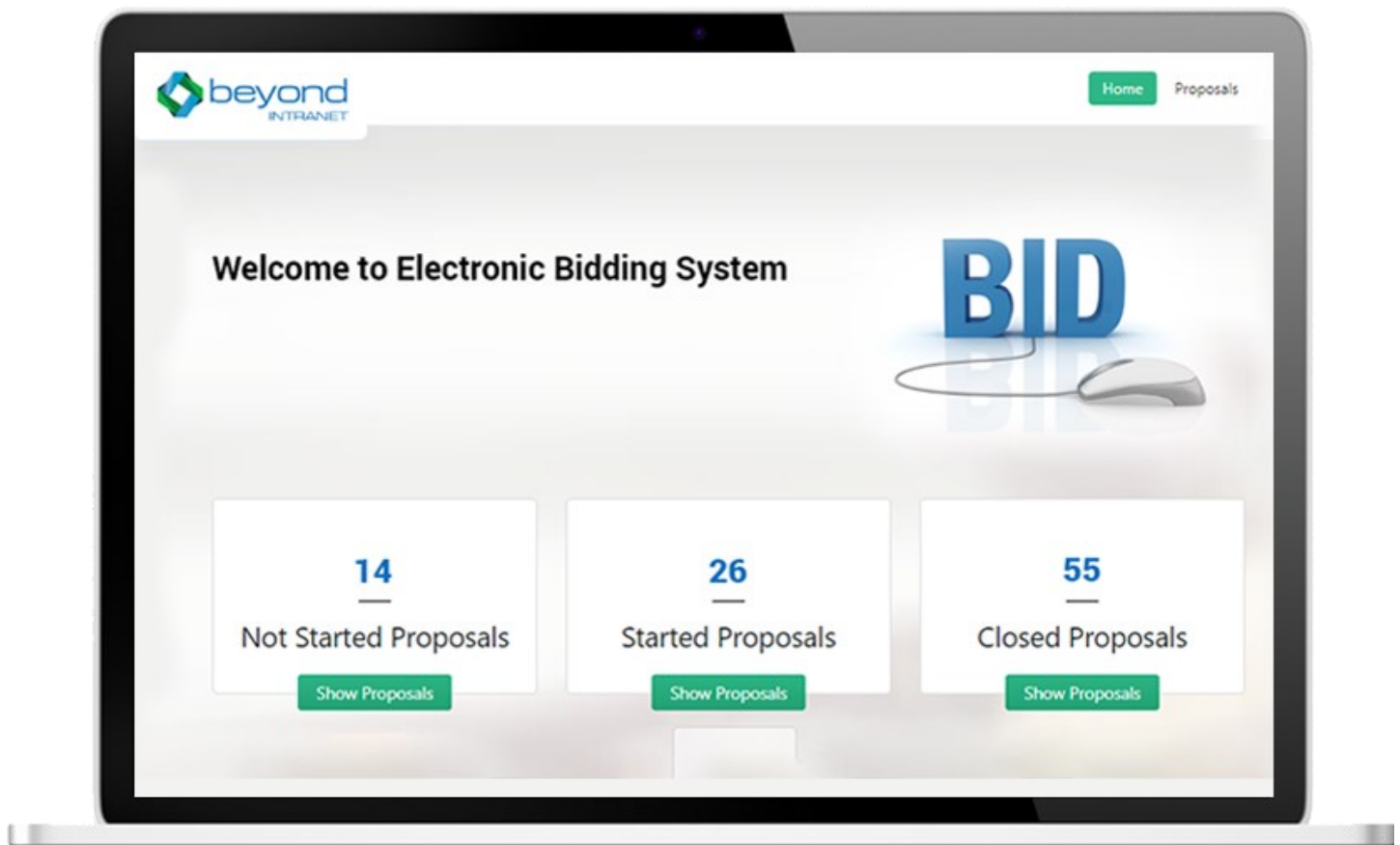


Results

The client was able to **tap the full potential** of the Office 365 user license their employees used with the new bid management service. Some other significant benefits of the system were:

- Using the custom-developed bid management solution helped the client make the bidding process **faster and seamless**. This helped Project owners, the evaluation team, and external bidders collaborate on one platform and easily work on bids.
- With an advanced level of user permissions and access levels, the **new system was 75% more secure** than the traditional bidding system.
- **Bidder repository** helped the client send bid invitations to appropriate vendors and save them from duplicating their effort on each bid.
- The **evaluation process also became smoother**, faster, and more secure than the previous system.
- The client was able to **close bids 35% faster** in the new system.

Screenshots



Add New Proposal

Proposal Title *

Bid Type * Technical and commercial Proposal separately ▾

Bid description

Wellcome to

Bid start date & time * 12 ▾ 00 ▾ AM ▾

Bid close date & time * 12 ▾ 00 ▾ AM ▾

Technical Members *

Commercial Members *

Minimum Member's count for evaluation *

Notification days for reminders *

Attachments No file chosen