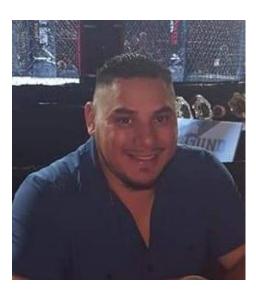# Speakers

Joe Lambertson
Country Glass & Mirror

Chris Medina
Grand View Glass

Eric Miller
TRUE

Creating an Efficient Bidding Process

- Aggregating Invitations To Bid (ITBs)
- Handling multiple GC bidders per bid
- Tracking RFIs
- Aiding Estimating w/Takeoff Apps
- Managerial Review
- Proposal Creation
- Reporting
- Pre-Con Prep

Aggregating Invitations To Bid (ITBs)

- Consider how ITBs are organized. If they're in a single person's inbox and that person is out sick, deadlines could be missed.

- Populating a shared spreadsheet is a popular option, but that also takes daily data entry work by someone.

- Services are now available that organize ITBs from multiple sources automatically, such as from PlanHub, ConstructConnect, BuildingConnected, and directly from GCs.

Handling Multiple GC Bidders per Bid

USAFA Hotel - Colorado Springs

- Preparing and organizing multiple proposals, revisions, due dates, and correspondence can become daunting when a bid has many GC bidders to keep track of.

- Ensure your process keeps these deadlines organized, and each proposal, if different from each other, are tracked per GC.

- All bid due dates should be visible on a calendar to assist in planning.

- Reminders should be set up to assist Estimators from missing key deadlines.

Tracking RFIs

- Keep track of submitted Requests for Information (RFIs) which may not be answered prior to the bid deadline by an Architect but provide key support documentation when a change order request is submitted later.

- Potential lawsuits years later can be mitigated due to a RFI that was submitted during the Bid or Pre-Con stages, so encourage their submission and include them in your process.

Aiding Estimating w/Takeoff Apps

Use the appropriate takeoff app for the project scope, CNC, anticipated metal vendor, and estimator know-how to optimize efficiency. Each app has its own strengths and weaknesses:

- WinBidPro by GDS Estimating

- LogiKal by OrgaData

- glazierSTUDiO / PartnerPak+ Studio by DeMichele Group

- PrefSuite

- STACK

Medtronics Lafayette - Interior

Managerial Review

- Common quality assurance checks usually include a manger performing a quick overview of the scope, takeoff, pricing, and markup. Consider only requiring a review if Bid exceeds a specific dollar amount.

- Verify multiple vendor quotes were obtained for each scope for the lowest material price.

- Determining the correct markup is critical. Balancing GC reputation, anticipated project timeframe, labor availability, and frustrating contract conditions correctly will yield a competitive, yet healthy bid amount.

Proposal Creation

- Using Microsoft Word or Excel is still quite common and can work well if integrated with a home-grown Excel take-off spreadsheet.

- However, consider other apps, available online, that assist with automated proposal generation including cost breakdown, summaries, and email templating.

- When proposal amounts are generated directly from the estimate amounts, as opposed to being typed into Microsoft Word, the human error factor is greatly minimized.

Reporting

Important metrics include:

- Knowing which Estimator was responsible for which bid.

- The quantity and total dollar amount of bids sent over a period of time by each Estimator.

- Win/Loss ratio, by **Estimator**, for both quantity and amount, over a period of time.

- Win/Loss ratio, by **GC**, for both quantity and amount, over a period of time.

Pre-Con Prep

- To minimize the data entry it takes when a contract is awarded, a properly prepared bid will already have a breakdown for:

  - Common Schedule of Value amounts
  - Estimated costs (budget) and estimated hours (labor)
  - Internal cost codes for Work-In-Process reporting

- This allows the submittal process and first pay app for material purchases to proceed smoothly.

Google 1 and Google 2 Boulder Campus

Takeaways

- Aggregate Invitations to Bid (ITBs)
- Manage multiple General Contractor (GC) bidders for each bid
- Track Requests for Information (RFIs)
- Support estimating with takeoff applications
- Conduct managerial reviews
- Facilitate proposal creation
- Generate comprehensive reporting