Hso

Dynamics Tender Management

for Microsoft Dynamics 365 for Customer Engagement

Content

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

Hso

1 *Introducing*
Dynamics Tender Management

Every tendering process is a combination of stakeholder, risk and project management, and the complexity of this process is growing. By using Dynamics Tender Management, you obtain a firm grasp on your bidding, procurement or 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.

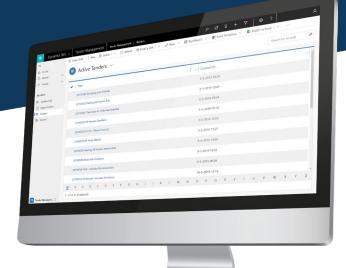You need to obtain an end-to-end, real-time insight into the overall process, including sub works or projects while improving cost control and allocating resources more effectively. With tender management, documents from various suppliers and partners need to be managed via email or by file-sharing platforms. Our integrated approach avoids having to switch from one system to another and save much time while providing accurate version control.

Benefits

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

Hso

2 Integrated *Tender Process*

By using leads and opportunities within Dynamics 365 for Customer Engagement to monitor the commercial tendering phase, corresponding business process flows and Stage-Gate processes can be made specific per Project Risk Category. Depending on the Project Risk Category, the right business process flow with mandatory fields can be triggered. In case a Project Category changes during the tender process, the corresponding business process will also change.

Categories can be divided to quickly gain insight into the various risk groups. When creating a new opportunity or quote, the defined risks can be automatically copied, so there is always a checklist and you are alerted to the risks.

After a lead is marked as qualified by a pre-qualification team, the lead 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. Information is entered once and enriched during this process, making participants more efficient while enjoying and benefiting from the integrated user-friendly approach.
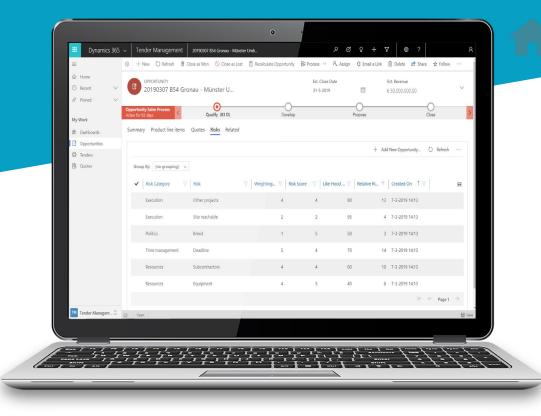
When using Microsoft Dynamics 365 for Project Service Automation to register and report on budget and actual costs, you will also enjoy the ultimate way to connect the acquisition, tendering and realization process to project control. Opportunities are used for acquisition, qualification and monitoring 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.

Hso

Easily *Manage Multiple Opportunities*

and *Simplify Stakeholder Management*

Hso

3 Better *Risk Management*

Projects are becoming increasingly complex and the demands regarding quality, sustainability and nuisance during implementation are becoming increasingly higher. Macroeconomic aspects like political developments, boycotts or changing trade agreements, follow each other quickly.

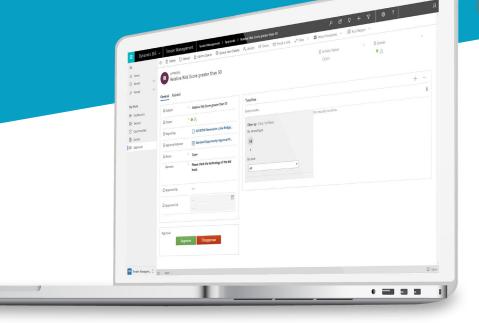When a quote is accepted by an opportunity, the next stage in the process is a project.

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 adequate tooling to support profound risk management scoring is the right choice.

Hso

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
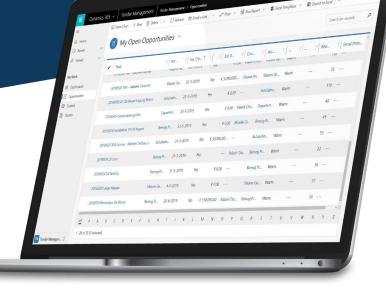
access to the right information, helping them to make a more informed decision about signing-off a quotation.

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 value of this results in less risk, an increased level of awarded contracts, and ultimately a more customer-centric approach to projects.

Report Correctly on your *Forecast,*
Speed Up Approvals and *Increase Win Rate*

Hso

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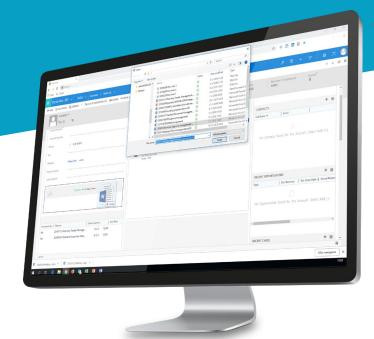
Integration of systems also helps to deal with an important factor in tendering: meeting the deadline. Organizations often struggle with deadlines and should always be prepared with trained and available resources equipped with adequate tooling to handle urgencies regarding bid preparation and timely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

Most big projects are separated in 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. When using Dynamics Tender Management combined with Dynamics Advanced Project Service with Dynamics 365 for Project Project Automation, standard separations 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.

6 | *Document Management*

Although Dynamics 365 for Customer Engagement comes with a standard integration with SharePoint Online, 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, releasing 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, which is effective and user-friendly. 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.

Prerequisites
Microsoft Dynamics 365 for Customer Engagement Plan, for Sales or for Project Service Automation.
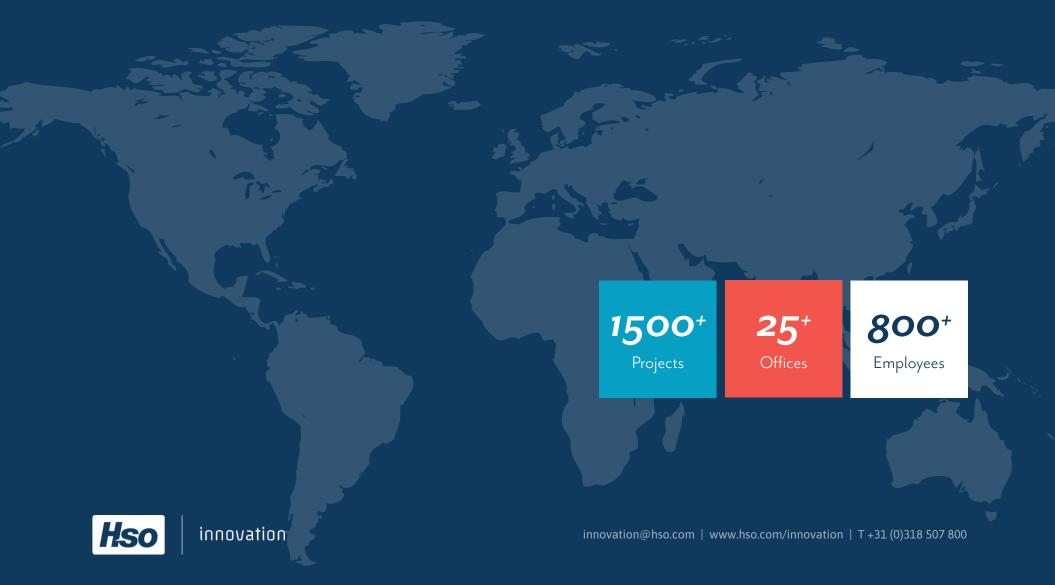
Want to know more?

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. Please feel free to contact us. We appreciate your interest!

Contact HSO Innovation

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

1500⁺
Projects

25⁺
Offices

800⁺
Employees

Hso | innovation

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

HSO Innovation offers new ways, using new technology, new applications, new processes, and new approaches to assist our clients in becoming digital leaders in their industry. HSO Innovation designs, develops, sells and maintains strategic and differentiating Dynamics Apps that drive outstanding results for our clients using Microsoft Dynamics 365. Combined with our wide range of Premiere Services that are offered on Microsoft Azure we improve overall business efficiency. Our Dynamics Apps and Premier Services are based on best practices developed over the years working directly with our customers across diverse industries and verticals.