SECTION 1: STORY

"BID PULSE CHECK for <XXX>" as we would like to call our APP as, and as the name suggest is an idea to check BID pulse by closely tracking the BID process of a Professional Service organization , here 'XXX' refer various roles involved in process/organization. As we all know, success of a service organization depends on how successful are they in BID and its conversion rate. BIDs normally involve various types of engagement with customers depending on their interest & needs, like RFI (Request for Information), RoM (Rough Order Magnitude), RFP (Request for Proposal), PoC (Proof of Concept) etc.

The BID process is driven by Bid Manager in collaboration with various stake holders and large team of experts (Architects & Senior Consultants) from different verticals and solutions. So, it's imperative for any professional organization that they have a good BID process in place and it is closely tracked & followed up till the end for delivering a successful and competitive BID.

So as the BID, subsequent activities and delivery preparedness by delivery team are equally important for Service Organization. Subsequent activities like planning, reporting and assessment by the stake holders and managers of Sales and Delivery. They would use these BID information to know the pipeline, market trend, performance (BID Conversion rate, of Bid team itself), Demand/Capability assessment (Skill & expertise assessment) and Up-skill planning & training.

Hence it becomes all the more important and imperative for any organization to have a BID process that can be closely tracked and followed up.

In a nutshell, this APP is aimed at supporting the following Roles and tasks:

1. BID SPOC or BID Manager - Who is responsible for driving a particular bid
   - Create & Update BID & Engagement details

2. Stake holders of Sales & Delivery (including people Managers)
   - Create and prepare reports to assess the pipeline, trend and demands and then planning

3. Bid team(Senior Solution experts/Architects/Consultants) & Delivery team (Individual consultants)
   - Self-assessment(including yearend Appraisal), Pro-active Up-skilling(& to seek training) and Project deployments

The App which I am submitting will specifically focus and provide necessary information required for the BID Managers, and hence the APP will be called "BID Pulse Check - BID Managers".

CASE STUDY:

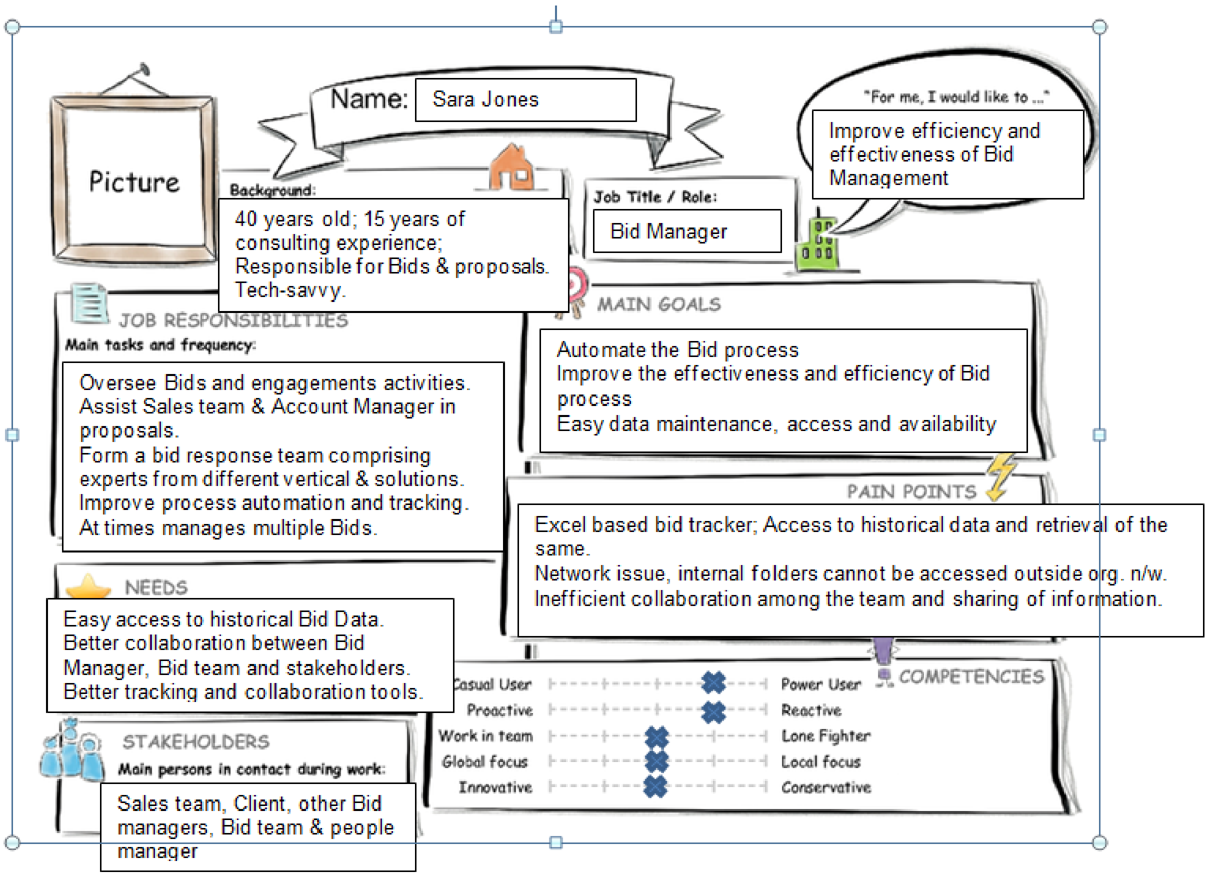
Sara Jones is a BID Manager and is responsible for managing the Bids, proposals and engagements activities, Assist Sales team & Account Manager in proposals. She is also responsible to form a bid response team comprising of experts from different vertical & solutions.

She often uses the Excel based Bid Tracker to access the historical data of the previous Bids and proposals which makes the whole process really cumbersome when it comes to collaborating information among the team members and the relevant stakeholders. She needs an APP which makes her life easy in terms of closely tracking the Bids activities and help in collaborating with stakeholders.

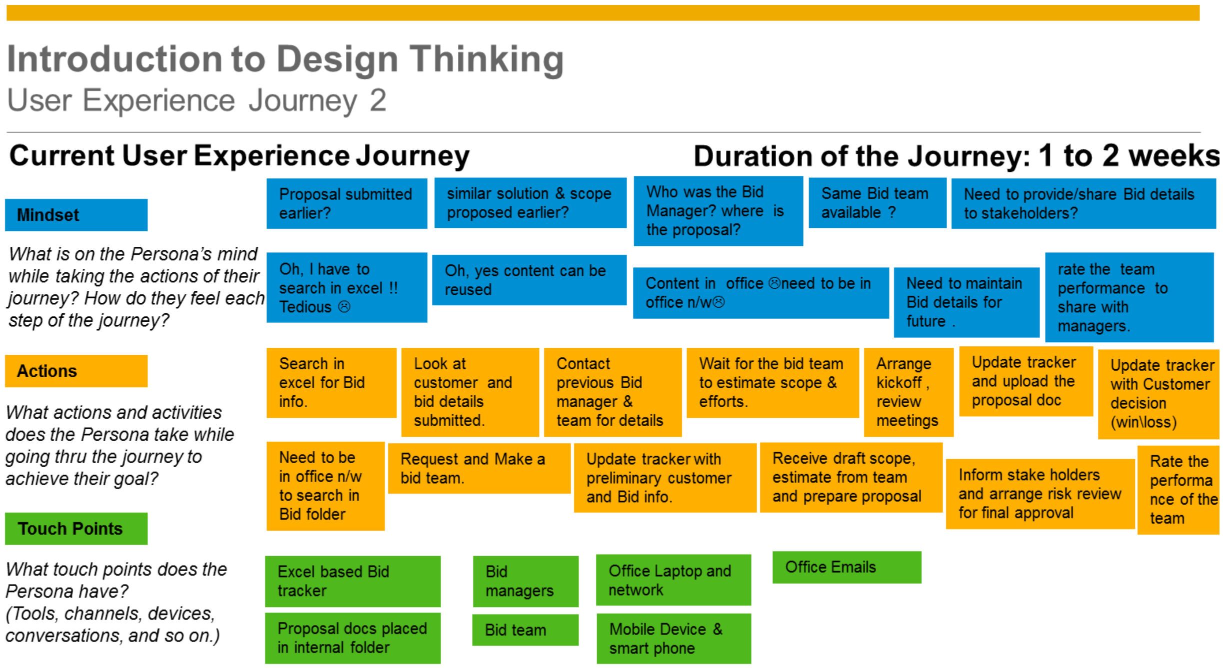
My App "BID Pulse Check - Bid Managers" will help the Bid Managers like Sara Jones to access all the information of the BIDs in a single click. This will automate the process of forming a BID team, entering /update all the relevant details like customer name, solutions proposed, Bid type, comments, likely start date , status , Total effort , Project Mode etc.

These details then, can be used later by all the relevant stakeholders whenever any requirement arises, instead of checking and accessing tracker, this app will find all those details for them and it helps them making informed decisions quickly and effectively without the pain of talking to so many stakeholders and checking through the Excel for every bit and pieces of information. This app will make the information readily available for the BID Managers, and this information is available for other stakeholders in their respective Apps.

SECTION 2: PERSONA

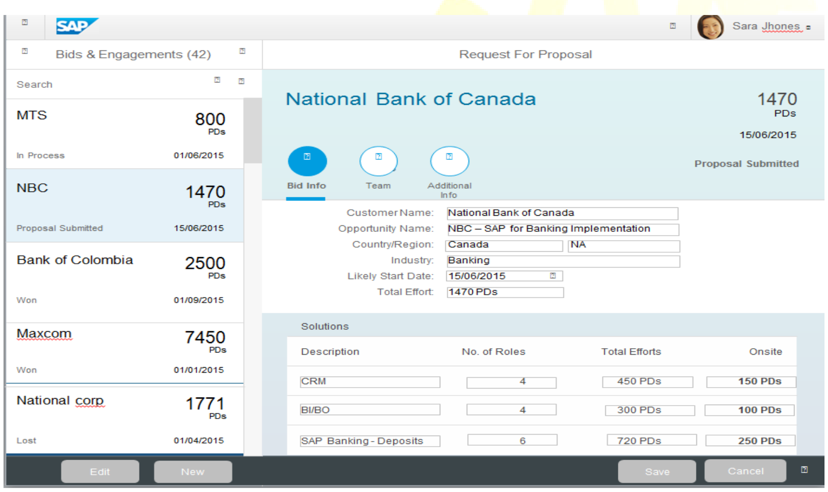


SECTION 3: USER EXPERIENCE

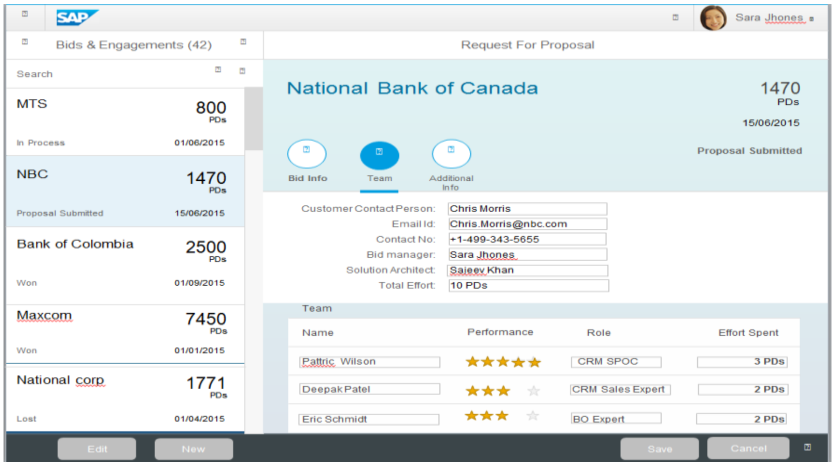


STEP 4: MOCK UPS FOR BID PULSE APP FOR BID MANAGERS

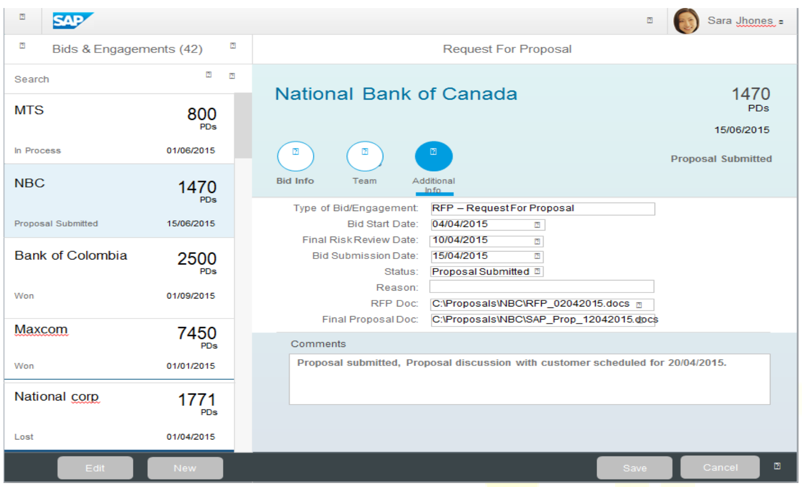
a) Master/Detail screen for Bids and Engagements



b) Master Detail screen for Bids and Team

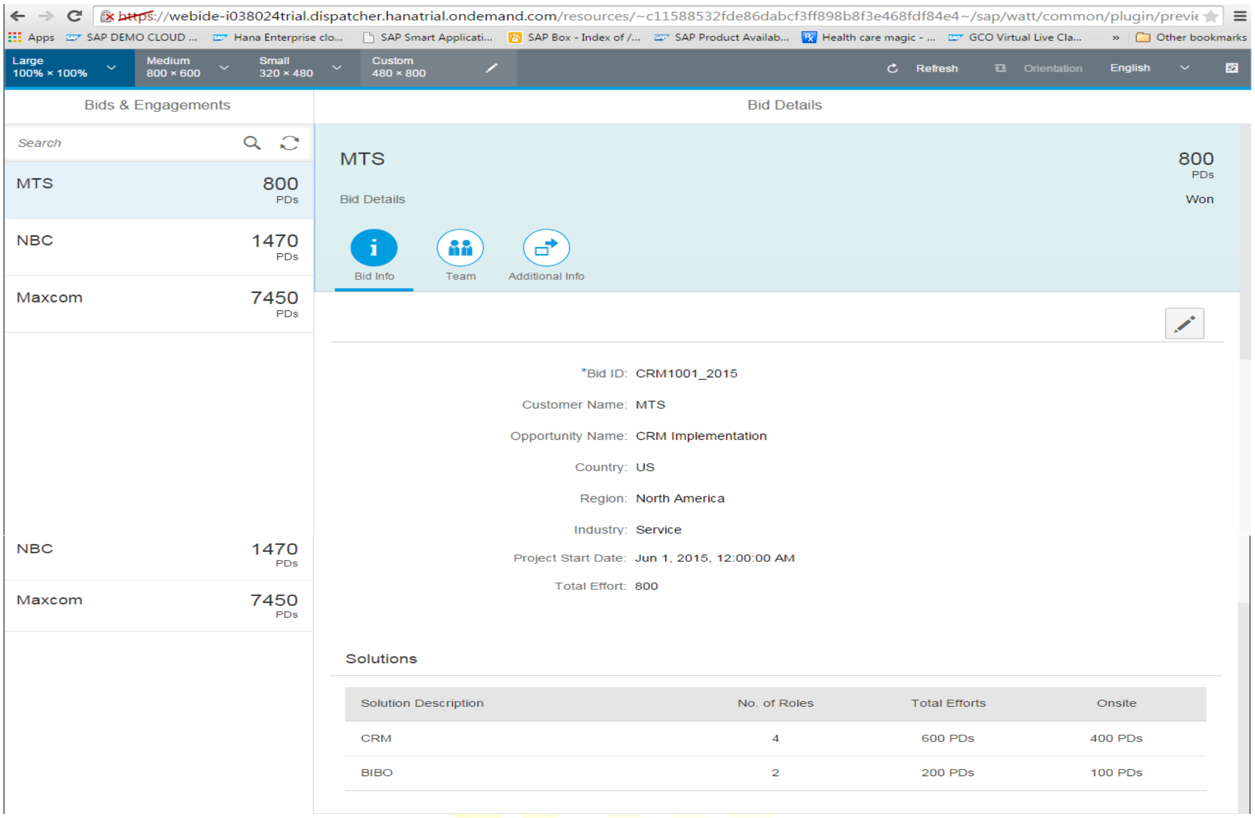


c) Master Detail screen for Bid and its Additional Information.

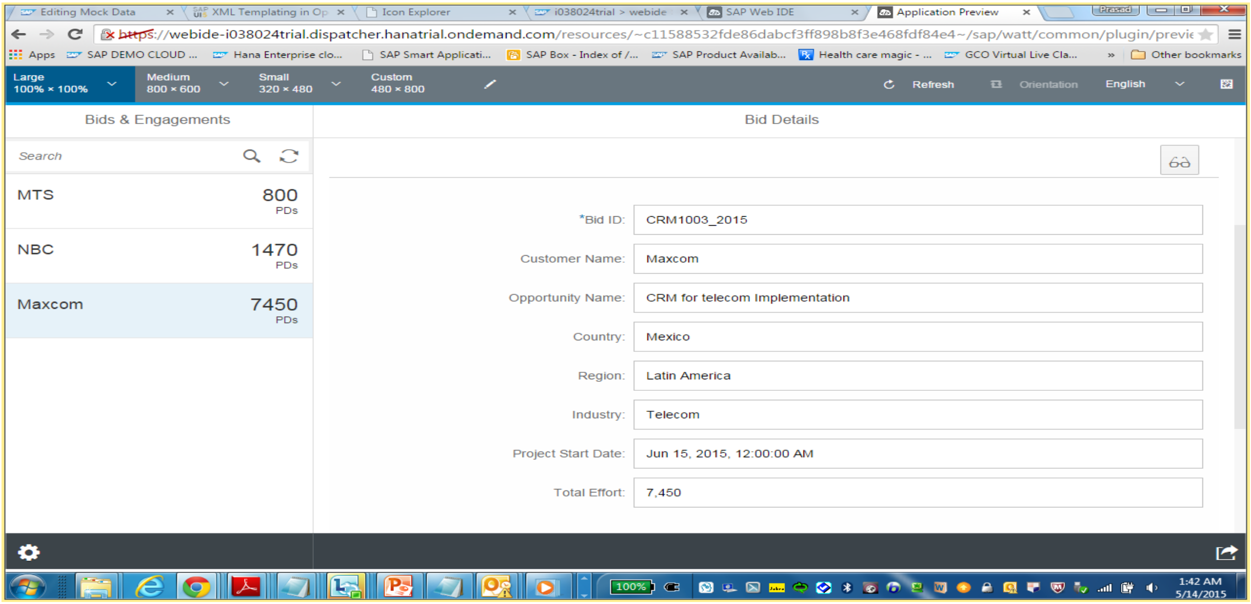


STEP 5: APP PROTOTYPE

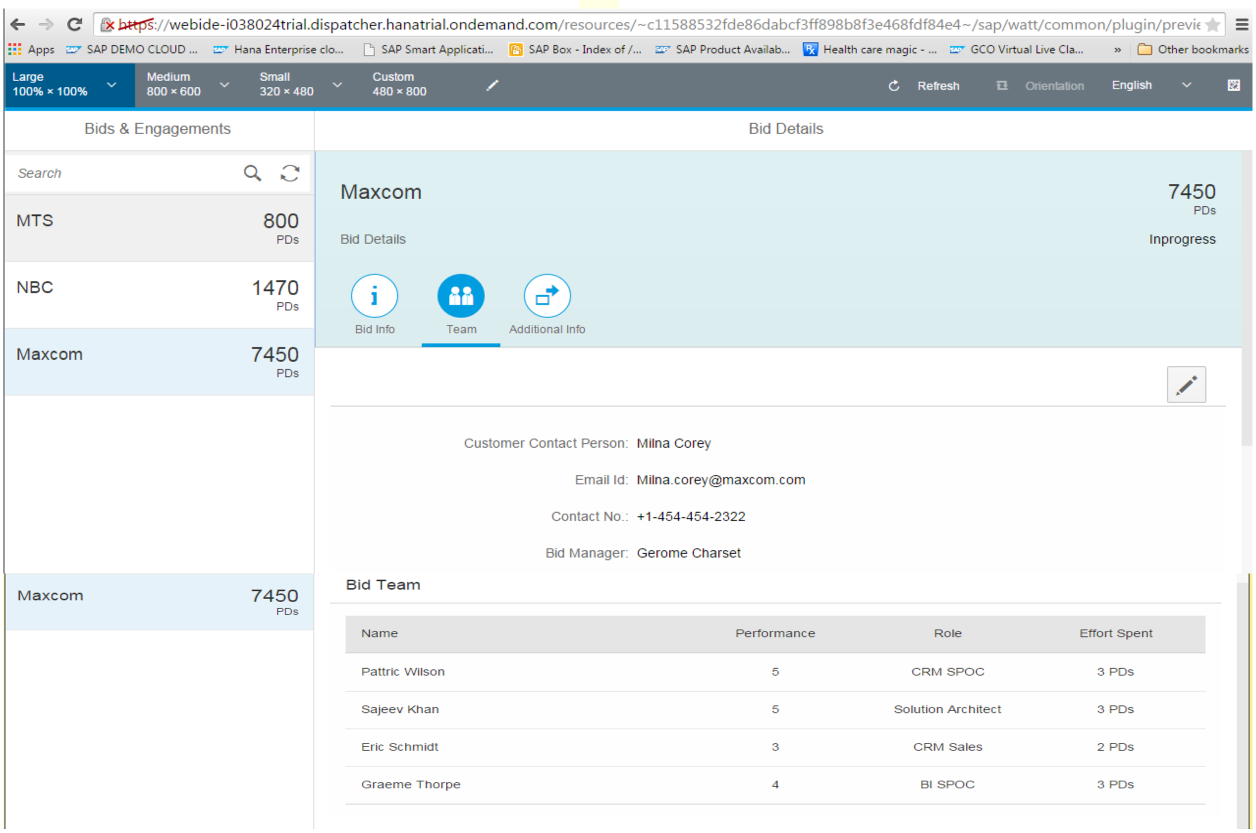
Step1. Sara Jones when logs into the App, she can see all the existing Bids on the Master screen on Left hand side. If she wants to check the details of any Bid, she can easily click on the Bids from Master screen.



Step2: On the Details page, Sara can add a new Bid with all details



Step3: At any point in time, if she wants to check the Team info related to a Bid, she can check that.



Step4: She can check the additional information related to the BIDs by clicking on Additional Info tab.

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