

Sales

Purpose and Scope

To plan, determine, review and communicate all sales activities. To ensure that tender documents are to be reviewed prior to submission of a tender bid for a fabrication project.

Responsibility

The directors ensure this procedure is implemented and maintained.

Procedure

Tender Review

The Directors and Manager will promptly review the tender documents using the standard requirements as detailed in the server Project Folder:

- work scope (including identifying all fabrication/protective coating/site assembly processes, materials requirements and any special testing/verification/post-delivery requirements)
- that customer specifications and drawings are complete and match the work scope
- that Builder 2 can meet any project-specific contractual requirements
- that Builder 2 can meet any project-specific health and safety requirements
- that Builder 2 can meet any project-specific environmental requirements
- that Builder 2 can comply with applicable statutory and regulatory requirements applicable to the work being tendered (including WHS and environmental legislation plus obligations under NSW Home Building Act 1989 for licensed trades, etc)
- that relevant standards are held by Builder 2
- that Builder 2 has the resources to undertake the work within the customer's timeframe
- that Builder 2 has suitable accreditation, when appropriate

A Director or the Manager will carry out a site inspection and attend any formal pre-tender conference (if required) as part of the tender review. A Director or the Manager will liaise with the customer to resolve any discrepancies, apparent omissions or uncertainties prior to submission of the tender. He will follow through any outstanding inquiries and will document any additional information obtained, source(s) and dates.

During the tender review, the Directors and Manager will consider the proposed methods of operation and site conditions likely to be encountered when site assembly is required, plus availability of personnel, equipment, materials and finance for the project.

If required for a tender, a Director or the Manager will prepare a Tender Program based on the anticipated availability of resources, to complete project milestones by the due date(s). Estimated outputs will allow for likely seasonal conditions. He will base his estimate on the Tender Program.

The Directors and Manager will determine goods to be supplied and work likely to be subcontracted. The Manager will prepare, and issue subcontract documents as required and obtain subcontract prices for tendering purposes. The Manager will review subcontractors/suppliers' submissions to ensure that their prices represent the scope of work requested.

The Directors will consult with the Company's insurance brokers to assess the insurance clauses in the tender documents.

Contract Review

Prior to executing contract documents, the Directors and Manager will examine them to ensure that they properly reflect the submitted tender and any subsequent negotiations and correspondence with the customer. They will verify that the contract documents adequately address any changes to the work scope.

The contract review will include:

- check whether contract documents are the same as the tender documents
- resolve any contractual differences
- check whether tender price is still valid (i.e. acceptance period has not expired)
- check customer's financial stability
- check that customer has accepted any qualifications in Builder 2's bid
- check that Builder 2's resources are currently available for this project.

Execution

Once the contract is finalised, the directors then plan, deliver and manage the contract through the Operations procedure.

Records

Sales Records are maintained by the directors by Project electronically for 10 years.