SALES CONSULTANT - LEVEL 1
Tender writing and bidding team

Document Version & History

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Role Tasks

Scope

As a Sales Consultant, you will be responsible for managing and coordinating the tendering and proposal process. You will work closely with various departments to ensure the timely submission of high-quality bids and proposals that align with the company's goals and objectives. Your primary objective is to secure new business opportunities through successful tender submissions.

Reviewing tender documents, scope of works, checking the feasibility for qualification, financial criteria, preparing presentations, risk matrix, information to top management to get approval for bidding.

Business Outcome:

- Process Success
- Cross Team Function Success
- Client Success
-

Process Success:

- Preparing winning proposals for RFPs/Tenders to grow business.
- Sourcing RFPs/Tenders through:
  - UNGM Portal for UN and its associated organisations
  - NGO Websites and Tender listing websites like NGOBox and DevNetJobs for NGOs in India and Abroad
  - Government e-Marketplace (GeM Portal) for India Union Government and State Government Tenders
  - Other RFP listing Websites
  - From LinkedIn
- Assess RFPs/Tenders to ensure it is meeting Emvigo’s criteria:
  - Criteria based on previous platform experience of Individual/Company
  - Criteria based on budget and hourly rates
  - Criteria based on Project Scope and Technology Stack (within Emvigo capabilities)
  - Criteria based on location/region of the lead

- Contact the organisation to indicate our interest in bidding for the specific RFP/Tender, either through email or their online portal.
- Collaborate with the team to publish RFP/Tender, hold feasibility discussions and gather input for project planning.
- Generate pre-bid queries from technical, financial, and organisational requirements.
- Participate in the pre-bid meeting, prepare queries, introduce Emvigo and its capabilities, and assist team members as necessary while actively engaging in discussions.
- Prepare checklist for each RFPs/Tenders according to the evaluation criteria.
- Conduct research on procuring organisation, requirements, platforms etc to gather more information for the proposal preparation.
- Collect technical estimates, graphics, and documents, outline deliverables and billing, and submit the proposal for review by Sales Head and CTO.
- Submit the proposals
    - Submit proposals on or before deadline through email or the procuring organisation's portal
- Update each stage of bidding in Trello and participate in the bid opening meeting if invited.
- Email or call the procuring organisation for RFP/Tender status. Follow up on bid opening day or next working day.
- Prepare and deliver a presentation for the second stage of bidding, collaborating with relevant teams, ensuring alignment with Emvigo's policies and pricing and supporting the sales team, ultimately handing over the successful bid information to the closure team.

Cross Team Function Success:

- Coordinate with team:
    - Publish RFP/Tender in the Tender team Skype group and Trello for tracking, conduct project feasibility meetings and gather team input
- Discuss and collect L1 estimation and necessary data from technical team.
- Coordinate and collect necessary graphics/diagrams from technical team or designers.
- Collect necessary documents from administration, finance and other relevant team.
- In the second stage of bidding:
    - Discuss with team and ensure the negotiations are in line with Emvigo's policies and pricing
    - Help the sales team to participate in the second stage of bidding
    - Ensure the success of bidding and negotiations with the help of sales head
    - Hand over the winning bid to the closure team by sharing all information you have with respect to the lead and the project scope.

Client Success:

- Reach out the procuring organisation to express our interest on bidding in the particular RFP/Tender through email or portal.
- Prepare pre-bid queries:
    - Based on the inputs given by the technical and finance team
    - Based on the functional and non-functional requirements of the procuring organisation
- Participate in the pre-bid meeting:
    - Prepare queries and participate in the pre-bid meeting
    - Help selected team members to participate in the pre-bid meeting if needed
    - Introduce Emvigo and its capabilities
    - Ask queries and participate in the discussions
- After submitting the proposal:
    - Send emails or make call to the procuring organisation to get status of the RFPs/Tenders
    - Do follow up on the bid opening day or immediate working day
- In the second stage of bidding:
    - Gather information from the relevant team and ensure negotiations aligns with Emvigo's policies and pricing
    - Support sales team in the second bidding stage
    - Secure successful bidding with sales head's assistance
    - Share lead and project scope details with the closure team for the winning bid

HR Policy Adherence

- Risk Management - Proactively raises risks upfront and suggests solutions or alternative approaches to prevent them.
- Adhere to all the technical and non-technical processes and suggest pros and cons to improve it.
- Proactively inform the leaves and availability of the line manager and it should be planned well and applied upfront in HRone. Inform the same PM if you are in an emergency situation.
- Maintain 40 Hrs and clock the efforts to the Time Management tool accurately and on time.

Competency Required

Iceberg Elements	Competency Attributes List (Weightage)
Skills (Proficiency)	1. Communication (4) a. Excellent written and verbal communication skills are crucial for crafting persuasive and coherent proposals. 2. Research (4) a. The ability to conduct market research and competitive analysis to inform bid strategies. 3. Analytical (3) a. Strong analytical skills to assess tender documents and ensure compliance with requirements. 4. Time Management (3) a. The capacity to work efficiently under pressure and meet strict deadlines. 5. Self-Learner (3) a. Keep oneself updated with the latest news. b. Learn basic technical terms to respond better to leads. 6. Attention to Detail (4) a. A keen eye for detail to spot errors and inconsistencies in proposals. b. Understand the Client requirement and create sales pitch accordingly. 7. Team Collaboration (4) a. Collaboration and coordination with internal teams and stakeholders to gather the necessary information for bids.

<table>
<tr><td>Knowledge (Proficiency)</td><td>
1. Bid Writing (4)
  a. Proficiency in writing compelling and concise bid content.
2. Semi-Technical Knowhow (3)
  a. Business & Basic Technology understanding.
3. Emvigo Capabilities and Projects (3)
  a. Should have a good understanding of what are Emvigo's services and products.
  b. Projects that Emvigo have done in the past.
4. Strategic Thinking (3)
  a. Ability to develop bid strategies to maximize the chances of success.
5. Business and Market Trends (3)
  a. Suggest features that are not considered in the scope but would benefit the audience.
  b. Understanding of the industry and market dynamics.
  c. Able to provide cost cut-offs to avoid Leads with less budget.
6. Deadline Management (4)
  a. Meeting tight submission deadlines while maintaining the quality of proposals.
7. Continuous Improvement (3)
  a. Commitment to learning from past submissions and continuously improving the bid process.
8. Customer Focus (3)
  a. A focus on meeting the needs and expectations of customers through tailored proposals.
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<tr><td>Self-Image (Perspective)</td><td>
1. Confident and Passionate
2. Self-motivated with a results-driven approach
3. Go Getter
4. Never stop trying.
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Traits (Perspective)	1. Approachable and Friendly 2. Positive Attitude and continue to see the good side of everyone 3. Passionate, Dedicated and Focused. 4. Willingness to learn and adapt 5. Honest
Motives (Perspective)	1. Personal and Organisation Growth by bringing more revenue/business 2. Thrive for constant improvement.

PERFORMANCE MANAGEMENT GOALS

Goals are categorised into 3 sections

Category	Details	Weightage
Business Outcome	Goals are Defined below in detail.	80%
Proficiency	Showcase growth in Knowledge and skills This will be done in the Skills-Base Tool. You would do a self-assessment and for the given role we will have a desired level of competency against each skill and knowledge.	10%
Perspective	Your Attitude and Traits are assessed by 360 Degree Feedback. We'll take a cross-section of your direct team, your manager, your peers and dotted-lined employees to get feedback. This would be part of the appraisal life cycle.	10%

Goals – Business Outcome

Category	Weightage 100	Weightage 80	Details
Process Success	64%	51%	Individual Detailed KPIs would be derived from the role sheet
Cross Team Function Success	15%	12%	
Client Success	15%	12%	
HR Policy Adherence	6%	5%	

PERFORMANCE REVIEW

Category	Tool	Responsible	Details
Business Outcome	HRONE	Goals would be divided to multiple people for Review e.g. HR Related Goals would be HR Manager	Self-Evaluation from Sep 1 to Sep 15 Mar 1 to Mar 15 Review Session would be scheduled by HR SPOC/Manager. The meeting will include 1. Reporting Manager (Mandatory) 2. HR Manager (Mandatory) 3. Finance Manager (Mandatory) 4. All SBU Heads (Mandatory) 5. BA Team Lead (Mandatory)

			All concerned reviewers should have the ratings done and ready before the meeting. We assess together as to why these ratings and come to a consensus. **1 Hour Meeting.**
Proficiency	Skills Base	Reporting Manager SBU Heads RTC	Self-Assessment from Sep 1 to Sep 15 Mar 1 to Mar 15 Rating Directly taken from the Skills-base
Perspective	Survey Sparrow	Peers, Dotted Line Manager, Direct reportees	This would be conducted from Sep 1 to Sep 15 Mar 1 to Mar 15 Rating Directly taken from the 360-degree tool.