

## PTL 6.0 Project Evaluation

### Objective

Determine the value of the project, whether we want to pursue it, and decide what resources will be necessary to successfully administer it before we offer the customer a bid.

## Procedure

1. Get plans from the customer.
2. Take off products we will produce if the bid is won.
3. Gather production deadline data.
4. Determine if this project would be beneficial to bid for.

### **Key Points**

- Get project plans for accurate bidding
- Evaluate the project, consider feasibility and profitability of producing it.
- Save time by eliminating unacceptable projects early in the production process.



# Tutorial

Library - Sales Project Task / Task - 6.0 Project Evaluation / Type Doc - Tutorial

## PTL 6.0 Project Evaluation

We evaluate a project occurs before we create a bid. We gather up all data, including plans and other customer input, and consider if this project is something we should pursue. We consider production times and project deadlines, and our knowledge of the customer to evaluate the profitability of this project.

We looked at the project briefly at 5.3 Pre-Qualify Project, but now we have the plans. We will make a thorough examination of the project, contacting the project's champions and primary agents to discover as much detail as possible before actually producing the bid, the necessary questions asked as if for the purpose of preparing the bid.

The determination of pass or fail will depend on many factors, such as mold to stone ratio, and construction deadlines. Stone Legends management will have the final say in a job failing the project evaluation, but a salesman/estimator should have all the important information, and have a reasoned opinion on the projects feasibility.

### PTL Outline

#### PTL 4: Gather Contact Data Details

#### PTL 5: Qualify Project Contacts

- PTL 5.1 Assign Project Champions (Installers and Other Personnel)
- PTL 5.2 Assign Primary Agents (Decision Makers)
- PTL 5.3 Pre-Qualify Project

#### PTL 6: Evaluate Project

- PTL 6.1 Get Plans
- PTL 6.2 Evaluate Plans
- PTL 6.3 Plan Follow-up

#### PTL 7: Bid Preparation and Submittal

#### PTL 8: Convert Bid to Job

