

"Gain Control of Bid and Tender Outcomes for Bottom Line Improvement and Sustainability"

# EFFECTIVE BID AND TENDER STRATEGIES WORK FOR GAS AND OIL SHOP

FNB CONFERENCE CENTRE. SANDTON  
JOHANNESBURG, RSA

23 - 25 February 2016

Hosted by:



In partnership with:



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### Course Facilitator:



Ted Landgraf (US) | Chief Executive Officer

For more than **30 years Ted Landgraf's** focus has been on National and Global Business, as well as Federal Government, with a focus in Operations, Administration, Finance, Compliance, Procedures, Business Development, **Project Management, and Procurement** for all types of business models. The companies he has worked with have ranged in **size from small (less than a million dollars) to large (in the tens of billions of dollars) all over the world.**

In 2000, he was listed in Who's Who International Entrepreneurs. In 2012, he was nominated and listed in the Worldwide Who's Who for Procurement Excellence. For more than 30 years, Mr. Landgraf has

Mr. Landgraf has provided **consultancy, Efficiency Evaluation and in all** facets of **purchasing and procurement cost reduction and solutions**, outsourcing, and services to a broad spectrum of clients, including **ExxonMobil, BP Oil**, Governments and other industries such as **Oil/Gas, Banking, FMCGs, Manufacturing, Telecommunications** and many more as **CEO at Compass NW**.



- ESI International (Contracts, subcontract, and management classes from 2006 to 2008)
- Two timer for International Who's Who Entrepreneurs
- ISO Auditor Certified (2007)
- Top 1 percent in BP School of Management (BP Oil, 1990)
- Top 3 percent in Exxon CORS Training (Exxon, 1989)
- Worldwide Who's Who Procurement Excellence
- Average costs for projects reduced by half a million
- 30 Years experienced
- Systematized procedures Streamline existing organizations
- Budget \$100M+ to billions
- Team creation Expert

### Workshop Overview

During this interactive training, each delegate will learn greater ways and methods of overall bid and tender results, effectiveness, tender efficiency and outcomes, supplier sustainability, communication, and steps for improved bottom lines, simple best practice on tender process management, templates, white papers, lecture, and interactive exercises.

The entire three days will not stop there; each delegate will have many tools they will be able to take back into their organizations and position for real and effective results as it relates to this course and the many areas we will cover. What is most important? Each person attending will be able to contact Ted Landgraf for greater relationship, questions, and anything else needed as it pertains to this workshop.

### Why You Should Attend ?

**The practical and applicable** areas you will learn and take away from this workshop will empower you, your team, your organization, and all that you do going forward with results in your organization and the oil and gas industry. **The techniques**, exercises, templates, forms, white papers, and other materials, you will receive electronically, will help you become more effective, communicative, your team will be able to do more, you will see greater bottom line results, best value will improve, and a host of other areas as outlined in the sessions. This workshop is not practical theory, but **REAL LIFE, RESULTS ORIENTED and TIME TESTED** techniques.

**With the many changes taking place in the oil and gas** business over the next decade, the need to become more effective with time, resources, less staff, many new people starting in the oil and gas industry, while many are retiring, and less money to accomplish what you need to do, you will not want to miss this workshop.

Register now : W: [peganix.com](http://peganix.com)  
T : + 27 11 041 0181  
F : + 27 86 407 8243  
E : [info@peganix.com](mailto:info@peganix.com)



Capitalize on the expert knowledge to gain maximum value on these vital issues :

- **ACHIEVE** improved supplier and client management and evaluation for greater outcomes through the bid and tender process
- **DRIVE** proactive bids and tenders for increased effectiveness and efficiencies
- **EMPLOY** proven methodologies, steps, templates, white papers, and experience for your bid and tender challenges
- **ESTABLISH** and utilize procurement outsourcing and off shoring to your benefit
- **IMPROVE** your bottom line with less staff
- **IMPROVE** your communications to your team, your organization, and your most valuable client (those within your organization that require products and services)
- **LEVERAGE** reduced costs, cost avoidance, soft cost, and sustainable measures
- **MASTER** and overcome challenges in the global economy, competition, sourcing issues, raw material shortages, and increased cost
- **MINIMIZE** supply chain disruption through proactive planning and risk management through the bid and tender process
- **QUANTIFY** your bid and tender processes, best practice, and systems with templates, forms, and contracts specific to your organization

### What will Delegates Receive?

Delegates will receive several White Papers ranging from: The 10 Steps to Reducing Costs; Procurement Outsourcing; Responding to the RFP Process; Successful Communications between Supplier and Tender; C Word (Hard Cost Savings versus Soft Cost Savings); Global Outsourcing Jobs; Purchasing Department Creation; and Personal Action Goal Planning White Paper.

Delegates will receive Worksheets on Procurement Outsourcing (PPT), Responding to RFP Process, Savings Examples from Construction, Saving Examples from Finance Health Insurance Bank, Savings Examples from Tribe, Exercise/Worksheet/Case Studies, and Power Point outlines for all twelve sessions.

Each of these templates, documents, white papers, and worksheets will help each delegate to do the following:

- Be able to reduce short and long-term costs with sustainability (Bid and Tender process mirrors contracts)
- Be able to work smarter and not harder and longer hours to accomplish what is being demanded of you
- Be proactive for greater results than reactive with non-desired consequences
- Create and implement your own bid and tender model that serves your organization, your department, suppliers, staff, and all others involved in your processes
- Create a best in practice team from your department, other departments, your suppliers, and your organization
- Effectively communicate so that work is done right the first time
- Improve your bottom line numbers through the tender and bid process
- Lead by example with our proven simple steps for bidding, tenders, and procurement (communications, management, and financial)
- Learn and implement bid and tender processes and best practice for easier solutions
- within this complex global world
- Understand how to gain more with less resources
- And much more

Testimonials :

#### **Global Company | Construction and Oil**

*"ATS was able to reduce costs by more than \$22M for the first year annual contract as it relates to our fuel management, spend, and areas related to our fuel spend."*

**COO, Fortune / Global Company**  
– Confidential –

#### **Global Oil Company (Regional)**

*"Ted not only reduced our costs by \$32M in first year expenditures in one category, but also systemized our processes, procedures, standardized best practice, reduced order time, expanded sourcing suppliers, and increased our reputation as a best in practice organization."*

**Regional Vice President, Fortune/Global Oil Company**  
–Confidential–

#### **Oil and Fuel Refinery**

*"Ted and his team were able to improve our bottom line through their unique and proprietary bidding process ... we did not have to let any workers go! Management was grateful for the actions and the increased effectiveness that came from improved communications by implementing best practices. Through Ted's centralized procurement, a new platform for proper supplier management and evaluation, new techniques and methodologies were instituted into the organization for greater accountability with company resources. The entire process empowered staff to be more active with holding people accountable for action items, which led to an increase in results with all resources."*

**CEO, Oil & Fuel/Refinery Supplier**  
– Confidential –

## Who Should Attend ?

**CEOs, CFOs, Directors, Heads of Departments, Managers and Executives, responsible for:**

- Bid and Proposal
- Tender
- Procurement
- Supply Chain
- Business Development
- Sourcing
- Contract
- Product and Service Management
- Performance management
- Business unit management
- Client Management
- Solutions Management
- Delivery Management

## COURSE SCHEDULE\*

- 08:00 - 09:00** Registration & Arrival Coffee
- 09:00 - 09:10** Opening Remarks
- 10:00 - 10:30** Tea Break
- 13:00 - 14:00** Lunch & Networking
- 15:00 - 15:15** Afternoon Break
- 16:30** closing Remarks

## WORKSHOP OUTLINE

### Day One

#### Session One

##### UNCOVER TENDER TYPE FOR BIDDING (RFP, RFT, RFQ, RFI)

- Assessing supply markets, completion, and potential future suppliers through the Request for Information process
- Being more effective with your time, supplier responses, and award results
- Developing effective bid and tender requirements and specifications
- How the Request for Proposal, Request for Tender, Request for Quotation, and Request for Information integrate in the Bid and Tender (Request) Process
- Proper and effective planning for best bid and tender value

Exercise and Worksheet – Beginning Bids and Tenders

#### Session Two

##### ASCERTAIN BID AND TENDER INVITATION

- Strengthening communications from pre-bid and tender through completion
- Acting upon complex and technical related bids and tenders
- Specifying instructions, scope of work, specifications
- Planning personal action goal
- Gathering information, pre-qualification and pre-tender (pre-RFP)
- Creating a proactive internal team work for successful outcomes

Workshop Class Exercise and Worksheet – Bid and tender Specifications

#### Session Three

##### BID AND TENDER PROCESS COMPETITIVE ENHANCEMENT

- Agreeing upon identification and bid and tender objectives
  - Team processes (internal and external)
- Implementing contract award
- Managing the bid and tender request processes
- Preparation for negotiation
- Cutting down supplier bid and tender response time
- Control tender negotiations
- Create winning proposal structures
- Writing and specifications requirement

Individual Exercise – Data

#### Session Four

##### EXECUTING COMPETITIVE ANALYSIS

- Understanding and implementing facts not opinions
- Pre-competitive analysis
- Competitive array steps, outline, and process
- Rating competition and suppliers
- Profiling competition and suppliers
  - The different elements to include in profiling
- How media scanning can be a great tool
- Estimating future competitors and suppliers

Individual Exercise – Competitive Analysis

### Day Two

#### Session Five

##### DESIGN THE BID TEAM

- Planning for success
- When and how
- Team stakeholders
- Building team tips
- Team request form and outline
- How to lead by example
  - Success tips
  - Goal planning

##### Group Exercise – Team Building

#### Session Six

##### WHOLE LIFE COST ANALYSIS

- Cost and bidding trends
- Identifying cost areas
- Determining the real costs
- Minimizing Post Mortem
- Rating areas of importance
- Building a proper foundation

##### Group Exercise – Whole Life Cost Analysis

#### Session Seven

##### MINIMIZE TENDER APPROVAL (BETTER TIME MANAGEMENT AND ORGANIZATIONAL RESOURCE UTILIZATION)

- Process from initiation of needed project, product, service, and material to contract and purchase order award
- Simple negotiation and best practice
- Bid and tender documentation, security, and compliance
  - Centralized bid and tender processes
- Evaluating bid and tenders
- Conducting negotiations with results

##### Group Exercise – Effective Meetings

#### Session Eight

##### BID AND PROCUREMENT COST REDUCTION ALIGNMENT

- Analyzing and mapping stakeholders
- Analyzing spend
  - Segmenting category spend
- Cost saving and agreement
- Cost reduction and bottom line improvement
- Identifying and analyzing the cost improvement opportunity
  - Calendar year spend, organization sales forecast, market, current budget
- Identifying and defining internal best practice
  - Sustainability and effectiveness
- Identifying internal business needs
- Retaining competitive pricing: market intelligence, analysis, benchmarking, monthly analysis

##### Case Study – Executive Management Initiative

### Day Three

#### Session Nine

##### EVOLVE LONG TERM CLIENTS – PROPER BID / TENDER PROCESSES

- Forecasting bidders and supplier participants
  - Project response time, evaluation, expanding supplier base, supplier quality improvement
- Acquiring potential suppliers
- Negotiating and leveraging pricing strategies
- Driving supplier importance
  - For your success, processes, and organization
- Maximizing supplier performance and maintenance
  - Handling short term challenges and preparation for long-term sustainability, competitiveness, and risk management

##### Video and Exercise – Pricing

### Day Three

Continued

#### Session Ten

##### BID AND TENDER RISK MINIMIZATION & RISK MANAGEMENT

- Utilize external supply market analysis: request for information (RFI) use
  - Knowledge and empowerment through market data
- Establishing effective risk management: develop sourcing options
  - Building supply market and category knowledge
- Performance use based outsourcing and offshoring
- Supply chain risk and vulnerabilities analysis
- Transforming supply chain manufacturing and service process

#### Group Exercise and Worksheet: Risk Management – Minimization Bid/Tenders

#### Session Eleven

##### FUTURE BENCHMARKING ANALYSIS – EXPAND SUPPLIER EVALUATION

- Evaluating current suppliers
  - Supplier suitability, tracking, trends, and performance
- Pinpointing key performance indicators (KPIs) and output standards
- Gathering sourcing history: analyzing trends and history
- Supply chain improvement and process
  - Cost cutting with supplier deadlines, clear bids & tenders, standardized templates, & clear expectations (step-by-step approach)
- Obtain win/loss analysis

#### Exercise and Worksheet – Evaluation

#### Session Twelve

##### SUSTAIN AGREEMENTS AND CONTRACTS

- Overseeing contract checklist
- Refining contract objectives (identification and agreement)
- Sustaining contract standardization: effective contract management
- Mirroring specifications, scope of work, and bids and tenders
- Validating supplier contract accountability: contract violation, challenges, resolution, termination (supplier cooperation or blacklist?)
- Preparing supporting documentation, procurement, compliance
- Scrutinizing terms and conditions

#### Exercise and Worksheet – Bid and tender Foundation

END OF WORKSHOP

# EFFECTIVE BID AND TENDER FOR GAS AND OIL WORKSHOP '16

23, 24 & 25 February 2016 | FNB Conference Centre, Sandton | Johannesburg, RSA.

## Registration Form:

## Register or Enquire

Contact Simon via:

- 1 Tel : (+27) 11 041 0181
- 2 Fax : (+27) 86 407 8243
- 3 Email : info@peganix.com
- 4 Web : www.peganix.com / www.peganix.co.za
- 5 Post : PO Box 1042, Ferndale 2160. Johannesburg, South Africa



### Please register the following delegate(s) for the event

- I would like to claim my group discount
- I would like to claim a 10% discount as a member of: \_\_\_\_\_
- I would like to claim a 50% discount as a registered and existing subscriber of Peganix (pty) Ltd
- I would like to use my credit.
- We would like this as an In-House - Dates: \_\_\_\_\_

Number of stuff your company/organisation is delegating to the event?

Approving Manager	First Name :	Surname :
Job Title & Department :	Email :	Direct Tel :
Fax :	Country :	Postal Address :
Billing Information / Account Manager	First Name :	Surname :
Full Company Name :	Nature of Business :	
Address :		
Signature:		Date:

## Delegate Attendance information:

**Note:** Please provide information as you wish it to appear on your name badge and on the official participant database.

Title	Delegate Name & Surname	Position	Email

Course Fees	Early Bird Fee (Register & Pay before 1 November 2015)	Early Bird Fee (Register & Pay before 1 December 2015)
USD1, 000.00*		
3-Day Course	USD8,00*	USD9,00*

### Payment Policy

**Payment** - In order to secure your registration, payment is due in full upon receipt of invoice.  
**Confirmation** - Your registration will not be confirmed until such time as payment is received and may be subject to cancellation.  
**Right of Admission** - Peganix reserves the right to refuse admission to the training course where evidence of full payment cannot be shown.  
**In-House** - 50% or Full payment is to be made to Peganix before running an In-house Training

### Payment Methods

Electronic Transfer  Direct Deposit  Draft  Cheque

### Banking Details

Bank:	First National Bank
Account name:	<b>Peganix (Pty) Ltd</b>
Account no.:	62453975701
Branch code:	261750
Swift code:	FIRNZAJJ
Reference:	Insert your ref number on the deposit slip please

### TERMS & CONDITIONS

By signing and returning the registration form, the authorising signatory on behalf of the stated company is subject to the following Terms & Conditions:  
**Delegate Substitutions** – Delegate substitutions are welcome at any time and do not incur any additional charges. Please notify Peganix in writing of any changes.  
**Delegate Cancellations** – All delegate cancellations must be received in writing and are subject to the following conditions:

- for any cancellations received 2 weeks before the start of a training course, will issue a credit voucher for the value paid to be used for up to one year for current events from the date of issue for any future training.
- for any cancellations received less than 2 weeks before the date of the training course, the full fee will be payable and no refunds or credit vouchers will be given
- if a registered delegate does not cancel and fails to attend the training course, this will be treated as a cancellation and no refund or voucher will be issued

**Transfers;** Transfer requests must be made in writing 7 days before the start of the event

**Peganix**

- Please note that speakers and topics were confirmed at the time of publishing, however, circumstances beyond the control of the organizers may necessitate substitutions, alterations or cancellations of the speakers and/or topics.
- As such, Peganix. Reserves the right to alter the advertised speakers and/or topics if necessary. Any substitutions or alterations will be updated on our web site and social media pages as soon as possible

### Important Notes

1. Only corporate registrations will be accepted.
2. **Group Discount:** Groups of 5 or more from the same company (booking at the same time and of the same billing source) can enjoy a **10% off the total delegate fees** or have the **6th delegate come for free**.
3. **Super Early Bird & Early Bird Promotion:** Early Bird Fees will only be valid if payment is received by stipulated date, after which Regular Fee will apply.
4. **Full payment is mandatory upon registration for admission to the event.**
5. Fee includes lunch, refreshments and documentation.
6. The organiser reserves the right to make any amendments that it deems to be in the interests of the event without any notice.

### Cancellations & Replacements

A replacement is welcome if you are unable to attend. A full refund less 10% administrative charge will be made for cancellation received in writing 2 weeks before the event. Regrettably, no refund can be made for cancellation received after 2 weeks before or for "no show" participant. You will however be credited to a future Peganix event. This credit will be available for up to one year from the date of issuance. In the event that Peganix postpones an event, delegate payments at the postponement date will be credited towards the rescheduled date. If the delegate is unable to attend the rescheduled event, the delegate will receive a credit voucher representing payments made towards a future Peganix event. No refunds will be available for cancellations or postponements. Peganix is not responsible for any loss or damage as a result of a substitution, alteration or cancellation/postponement of an event. Peganix shall assume no liability whatsoever in the event this conference is cancelled, rescheduled or postponed due to a fortuitous event, Act of God, unforeseen occurrence or any other event that renders performance of this event impracticable or impossible. For purposes of this clause, a fortuitous event shall include, but not be limited to: war, fire, labour strike, extreme weather or other emergency. Please note that speakers and topics were confirmed at the time of publishing, however, circumstances beyond the control of the organisers may necessitate substitutions, alterations or cancellations of the speakers and/or topics. As such, Peganix reserves the right to alter the advertised speakers and/or topics if necessary. Any substitutions or alterations will be updated on our web page as soon as possible.

### Workshop Venue & Hotel Reservation

Hotel room reservation and hotel billing are to be made by delegate directly with the Hotel. Hotel reservation and travel arrangements are the responsibility of the registrant.