**Business Development Workflows**

1. **Business Development Work Stream**

* Records agreed Bus Dev actions:
  + All approved BusDev activities
  + The type of activity – ie. PQF / Tender / Submission for Awards / Invitations to be sent / PP Presentation for Interview / Clarifications Documents / Marketing activities / General Bus Dev Material Updates / etc.
  + Due date for completion
  + Who the tasks are assigned to *(perhaps this might need to be expanded a bit, so we know who’s doing what in a PQF / Tender – i.e. who’s doing the PEP / pricing / etc??)*
  + Any notes of interest
* Business Development Director advises on updates for inclusion & then updated by Bus Dev Team

*Suggestions:*

*Tasks -perhaps this might need to be expanded a bit, so we know who’s doing what in a PQF / Tender – i.e. who’s doing the PEP / pricing / etc??*

1. **PQF Record File 2015**

Records all Public Projects that may be of interest, recording main points of interest.

Director’s decision of whether to go for project or not is recorded on this document and then if an application is being made then the project is added to the Business Development Work Stream Document.

The succes of the application should also be recorded on the PQF Record File.

1. **Stewart Project Tracker 2015**

* Records all Private Projects that may be of interest, recording main projects points of interest.
* Projects are sourced through main online search facilities:

<http://www.cisireland.com/>

[http://www.myprotel.co.uk/](http://www.myprotel.co.uk/user/login?destination=node)

Projects can also be sourced through the planning departments of the various County Councils, I.e. <http://www.dlrcoco.ie/aboutus/councildepartments/planning/>

* General project search parameters include:
  + Over €5 million
  + Commercial
  + Education
  + Mixed Use
  + Pharma
  + Industrial
  + Office
  + Medical
  + Food

(General residential normally is not included)

* Main project details are then recorded on the Project Tracker and ‘Expression of Interest’ emails are then complied by BusDev Team and forwarded to Bus Dev Director to send out to relevant consultants.
* Emails are targeted to the specific projects from a base template and the project references and the name and email address of the relevant consultant the EOI is to be sent on to is included in the email to BusDev Director.
* Once notification that a project from the Project Tracker is going to the next stage of PQF / Tender, then this is added to the BusDev Work Stream. It should also be noted on the Project Tracker what stages the application process reached.

1. **Tender Document Receipt Log**

* Used to log all tenders received
* Record acknowledgement
* Give each tender a unique JSL Job reference number.

1. **PQF Submission Documents**

* Prequalification submissions are saved into the PQF Folder in the BusDev folder under the relevant year. i.e.:

S:\Bus Dev\PQF Folder\PQF 2015

* A folder is opened under the project name
* Incoming documents from the client regarding the PQF Submission are generally saved into a folder called ‘PQF Documents’
* The Stewart Submission is generally saved into a folder called ‘Stewart Submission’
* All sub-folders are generally named according to the requirements of the PQF
* Submission docs tend to be pulled together from previous similar submissions.

1. **Tender Submission Documents**

* Tender submissions are saved into S:\Tenders Current
* Each Tender is given a unique JSL tender number ie. T15123

T = ‘Tender’

‘15’ = year

123 = 3 digit sequential number

* All Tender information docs saved into folder & all Stewart Submission docs saved into ‘Stewart Submission’ folder.

1. **Marketing Activities**

* Generally the following is covered in Marketing Activities:
  + Awards
  + Digital Media – Website / LInkedin / Facebook / Twitter
  + Adverts
  + Articles
  + News items
* Items such as submissions for Awards, etc. are added to the Business Development Work Stream for completion
* Social Media items are dealt with on an ‘as needed’ basis when there’s something relevant to post.
* Website – *bimonthly updates or as required if certain events or project completions, news dictates, etc.*