Leveraging Technology for Treaty Compliance

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Leveraging Technology for Treaty Compliance

Canada’s new trade treaties impose greater risk and uncertainty on traditional tendering practices; however, they also serve as a once-in-a-generation opportunity to reboot your procurement systems. This presentation will explain how Orbidder and Bonfire, two made-in-Canada procurement platforms, offer a cost-effective path to high-speed compliance.
Treaty Compliant 3.0 Series Templates
Ready to Launch for July 1, 2017

The Procurement Law Office has a proven track record of successfully updating the tendering templates of public institutions across Canada to meet the emerging global procurement standards that are now formally adopted under the Canadian Free Trade Agreement and the Canada-Europe Comprehensive Economic and Trade Agreement. In anticipation of the formal implementation of these new trade treaties, we have updated our Procurement Playbook templates with treaty-compliant 3.0 versions. For all template users, we recommend a rapid deployment using our Orbidder drafting system since this is the most efficient route to training your organization on the use of treaty-compliant templates.
Advancing the Art of Tendering
Smart Templates

“Most organizations remain mired in outdated tendering templates that require manual data entry, produce drafting gridlock and create version control chaos. Smart templates take us light years ahead of current drafting procedures by enabling team members to concurrently upload their content to facilitate coordinated document drafting and editing while allowing final document assembly with the push of a button.”

Paul Emanuelli

“2020 Vision: How To Relaunch Your Tendering System”
Purchasing B2b magazine, June 2016
Why Orbiddar?
Orbiddar automates and centralizes the design, drafting and assembly of RFX documents.

Access your full suite of Procurement Law Office tendering templates within Orbiddar.

ORBIDDER
RFX Drafting Control Room

1. RFX Design
2. RFX Drafting
3. RFX Assembly

Content Creation Defines Project Success

Content Carriers:
- Posting and Bidding Platforms
  (Content Carriers, not Content Creators)
- Bid Evaluators
  (Bid Evaluation Tools)
  (Used after Bidding)

Invoice Processors:
- Bill Payment Systems
  (Used after Contract Award)

Putting Human Intelligence Into Procurement Automation
1. Project Design

Orbidder’s project design interface guides your team through its procurement planning decisions, creating a customized project blueprint that aligns with the appropriate tendering template.

• Pick a Main Process Lane

• Design your contract and pricing structures from a menu of pricing forms.

• Insert your evaluation categories, weightings and thresholds.
2. Coordinated Drafting

Orbidder’s drafting control room allows you to assign drafting roles across your project team and monitor the progress of your drafting process as team members upload their specific project content into the system.

- Procurement Lead can Assign different roles to different team members or assign all roles to the same individual.
- Procurement Lead Assigns internal drafting deadlines to team members who receive automatic email notices of their assignments.
- Monitor the status of all current drafting projects.
3. Automated Assembly

Orbidder’s automated assembly process instantly integrates your team’s project content with the appropriate tendering template to produce high-speed and precise RFX documents.
Orbidder Metrics

Orbidder’s built in **Orbidder Metrics** help identify drafting bottlenecks by tracking drafting statistics at the project level and institutional level.
Orbidder Vault

Orbidder unlocks a **Global Vault** with free access to Procurement Office precedents, a **Local Vault** for your organization’s custom library, and a **Smart Snippet** interface to link drafters to the right drop-in content.

**Free Access to Our Global Vault**

**Customize Your Local Vault**

Build your own inventory of local content to store in your local vault for shared access by drafters across your organization:

- Drafters have immediate access to free shared content vetted by the Procurement Office in the Global Vault.

**Customize Your Snippet Library**

- Create a local inventory in your Snippet Library that directs drafters to pre-existing content that they can drop into the appropriate sections of the templates directly through their drafting interface.
Orbidder User Help Site

Orbidder’s User Help Site contains an extensive library of user instructions and training materials prepared by our procurement experts to help you prepare your procurement documents.

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Drafting Evaluation Criteria

During the project creation phase, the Project Initiator creates an Evaluation Grid that sets out different Rated Criteria Categories and their respective weightings and minimum thresholds:

Build Your Evaluation Grid

Set out the categories of criteria that will be evaluated for each submission, along with their respective weightings. If there is a minimum threshold that must be met before the bidder can proceed further in the evaluation process, include that here. Read more on drafting an evaluation plan.

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Insert Library Content

- Users can preview the content of a snippet using the "View" option and, if they like what they see, click "Insert" to populate their drafting field.

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What is an Initial Mapping Statement?

An initial mapping statement is a clear and concise statement that answers the question "What are we buying?" in non-technical language. It has two purposes:

1. It serves as a roadmap for the procurement design process, ensuring your team members have a consistent understanding of the scope of the project before the RFX document is drafted.
2. It gives readers an overview of the project to help them determine whether to read further.

The initial mapping statement will be inserted into the overview section of your procurement template as an introduction to the project. You may also choose to use it as your project overview when you authorize or post your bid documents. Show me an initial mapping statement in context.
Speed and Precision

With its suite of treaty-compliant tendering templates, Orbidder brings the ultimate RFX drafting command system to your fingertips to help you meet your deadlines and maintain your compliance standards.
Delivering Results

With Orbidder you can achieve the following results:

1. Integrate advanced procurement planning within your organization and enhance your project governance practices

2. Streamline your drafting procedures and strengthen your accountability controls

3. Accelerate your RFX drafting process and expand your use treaty-compliant tendering formats
**OUR STORY**

**BONFIRE PROJECT GROWTH**
from 2012 to today

- *First 50 clients* in partnership with public sector procurement teams
- *First $18 of spend*
- *First 100 clients*

**Founded** in partnership with public sector procurement teams

**Awarded** Spend Matters 50 to Watch in 2017

- **170 clients**
- **$12B in projects / year**
- **15 sectors**
- **#1 largest set of digitized RFx evaluations in the history of procurement**

**2012**

**2017**
Plus 140+ other clients in these and other sectors

98% client retention across 5 years in business
Status Quo

Mostly **OFFLINE**
Paper / USB / Email / Excel
Basic marketplaces / portals
Basic bidding tools

**FRAGILE**
- Greater scrutiny
- Policy tightening | CFTA & CETA
- Bid protests increasing
- "Do more with less"
- Talent shortage

Future-Proof Process

Fully **ONLINE**
Integrated listing, submissions, evaluations, decisions, contracting
Perfect compliance & audit trail
Easy & powerful online evaluations
Faster projects & major time savings
Instant stakeholder happiness

By 2025

Big Data Insights?
Shared Benchmarking?
Recommendations?
Ad-hoc Collaborative Buying & Community?
### RESULTS

**Case study results: $5B of RFx**

<table>
<thead>
<tr>
<th>SUPPLIERS</th>
<th>BUYERS</th>
<th>EVALUATORS</th>
<th>MGMT &amp; AUDITORS</th>
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<td>65% fewer disqualifications</td>
<td>90% less time spent administering</td>
<td>90% less time spent managing in-app</td>
<td>80% 100% - 300% project success</td>
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RECEIVE
Accept bids & proposals
Simple, safe, structured supplier submissions

Offline paper, binders, email, USB keys, etc

EVALUATE
Full online evaluation
Compare side-by-side, auto-score, eAuction, what-if

Offline packages, Excel scorecards & discussion

AWARD
Scoring reports & analytics
Instant scorecards, consensus tracking, award notifications

Consulting & Advice
Procurement Office negotiation for optimized pricing

NEGOTIATE
Consulting & Advice
Procurement Office negotiation for optimized pricing

SOLICIT
Online public supplier portal
Supplier matching, share documents, Q&A, addenda, etc

Manual compliance and review

OLD PORTAL / WEBSITE / NEWSPAPER LISTINGS

DRAFT
Design & Assembly
Customized blueprints, coordinated drafting, instant assembly

Instant compliance

Faster & time-saving

Happier stakeholders

Audit-Proof Decisions
Case study results: $5B of RFx

**SUPPLIERS**
- **8 min** avg. submission time
- **65%** fewer disqualifications
- **$100+** avg. savings vs paper submissions
- **90%+** ‘Would recommend Bonfire’

**BUYERS**
- **75%** of projects finish on time
- **½** the time spent administering
- **90%** less Excel vs the old process
- **1 hour** or less training on avg.

**EVALUATORS**
- **100%** faster scoring & evaluations
- **100%** less exposure to risk
- **100%** faster final decision process
- **100%** less exposure to errors

**MGMT & AUDITORS**
- **100%** faster contract & procurement review
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- **100%** faster final decision process
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Case study results: $5B of RFx

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**EVALUATORS**
- **50%** faster scoring & evaluations
- **9/10** 'How easy was Bonfire to use'
- **Zero** formal training required
- **90%+** 'Want to use Bonfire on next RFP'

**MGMT & AUDITORS**
## Case study results: $5B of RFx

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Leveraging Technology for Treaty Compliance

Canadian public institutions can now launch a full suite of treaty-compliant tendering templates in Orbidd er’s RFX drafting control room while simultaneously leveraging Bonfire’s electronic posting, bid receipt and bid evaluation platform. From strategic project design to final contract award, this proven combination of smart procurement technologies gives your team an end-to-end path to high-speed compliance.
August Repeat Webinar:

Treaty Myths and Compliance Strategies

*Treaty Myths and Compliance Strategies* will debunk emerging myths and misconceptions regarding Canada’s new trade treaties while offering our rapid action plan recommendations to help your organization achieve compliance with the new procurement rules. Register today to find out who is covered, how the new bid dispute rules impact you and how you should be prioritizing the required updates to your tendering templates, procurement policies, major project governance practices and staff training strategies.

**Wednesday, August 2, 2017, 1:00 - 2:00 pm EDT**

[REGISTER FOR AUGUST 2]
Introducing the Live Online Learning Series

We are pleased to announce the launch of our new Live Online Learning series. These webinars offer the best of both worlds, combining the interactivity of in-person training with the accessibility of online learning. Whether you book a single ninety-minute session, select a full training stream, or build a custom program, Live Online Learning offers exclusive access to the leading-edge training your team needs to excel in its tendering cycle. Please see our training catalogue and contact us for more details.

Contact us for pricing and to book your Live Online Learning dates!

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[Download the Canadian Law Series Catalogue]
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Upcoming Free Webinars

How Do You Measure Up? Fourth Annual Survey Results
June 21, 2017 @ 1:00 pm - 2:00 pm EDT

Treaty Myths and Compliance Strategies
July 12, 2017 @ 1:00 pm - 2:00 pm EDT

Treaty Myths and Compliance Strategies
August 2, 2017 @ 1:00 pm - 2:30 pm EDT
For more information please contact:

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