BREAKDOWN OF TYPICAL CONTRACT VALUE

80%

15%

5%
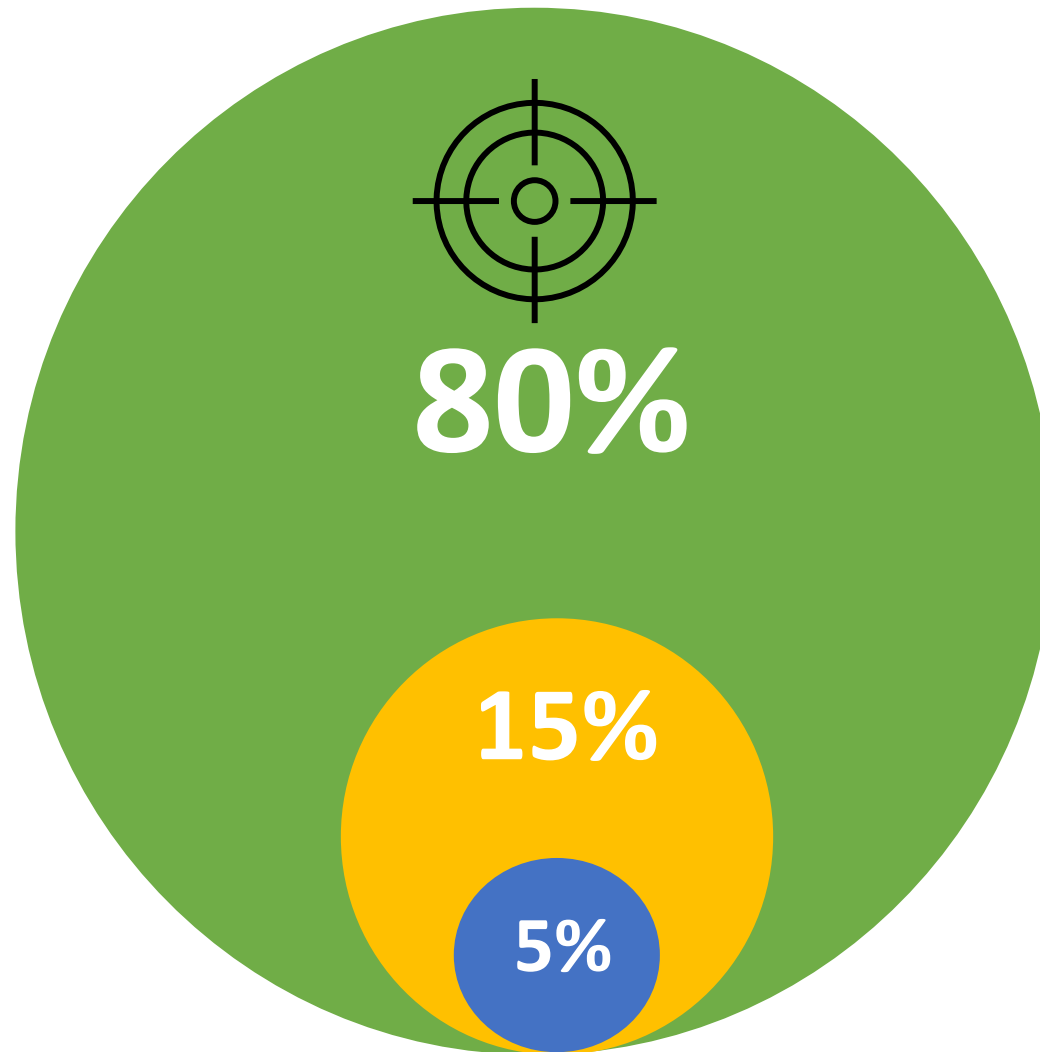
Subcontractor Costs

Overhead Costs

Profit Margin

SITE PASSPORT

"Our mission is to help our customers optimise the 80% by providing best-in-class *Procurement & Supply Chain* solutions"

Our solutions help construction companies to *capture, organise, analyse and visualise quality data* to *improve decision* making around
Supply Chain evaluation & selection

"Better data leads to better decision-making leads to better outcomes"

Increased Competitiveness	Improved Profitability	Increased Performance	Improved Governance	Reduced Risk

SITE PASSPORT

Actavo

walls

CLANCY
Built on Partnership

D/RES

PARK
DEVELOPMENTS

M&P
BUILDING & CIVIL ENGINEERING CONTRACTORS

Lioncor

IPUT REAL ESTATE DUBLIN

bannon

OUR SOLUTIONS

SITEPASSPORT

DISCOVER
DATABASE

ENGAGE
DATABASE

SEGMENT
DATABASE
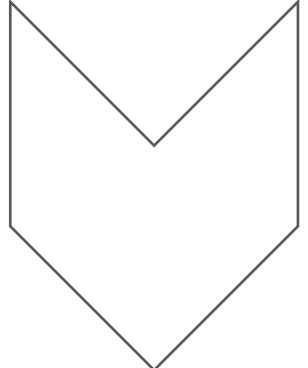
BID/TENDER

CONTINUOUS
IMPROVEMENT

CENTRAL INTELLIGENCE

INTEGRATED, MANAGED & MAINTAINED

INSIGHTS

ONBOARD/
CONTRACT

MONITOR

EVALUATE
PQQ/ESG/CAS/SAQ

EVOLUTION OF SOFTWARE OVER THE PAST 15 YEARS

SITE PASSPORT

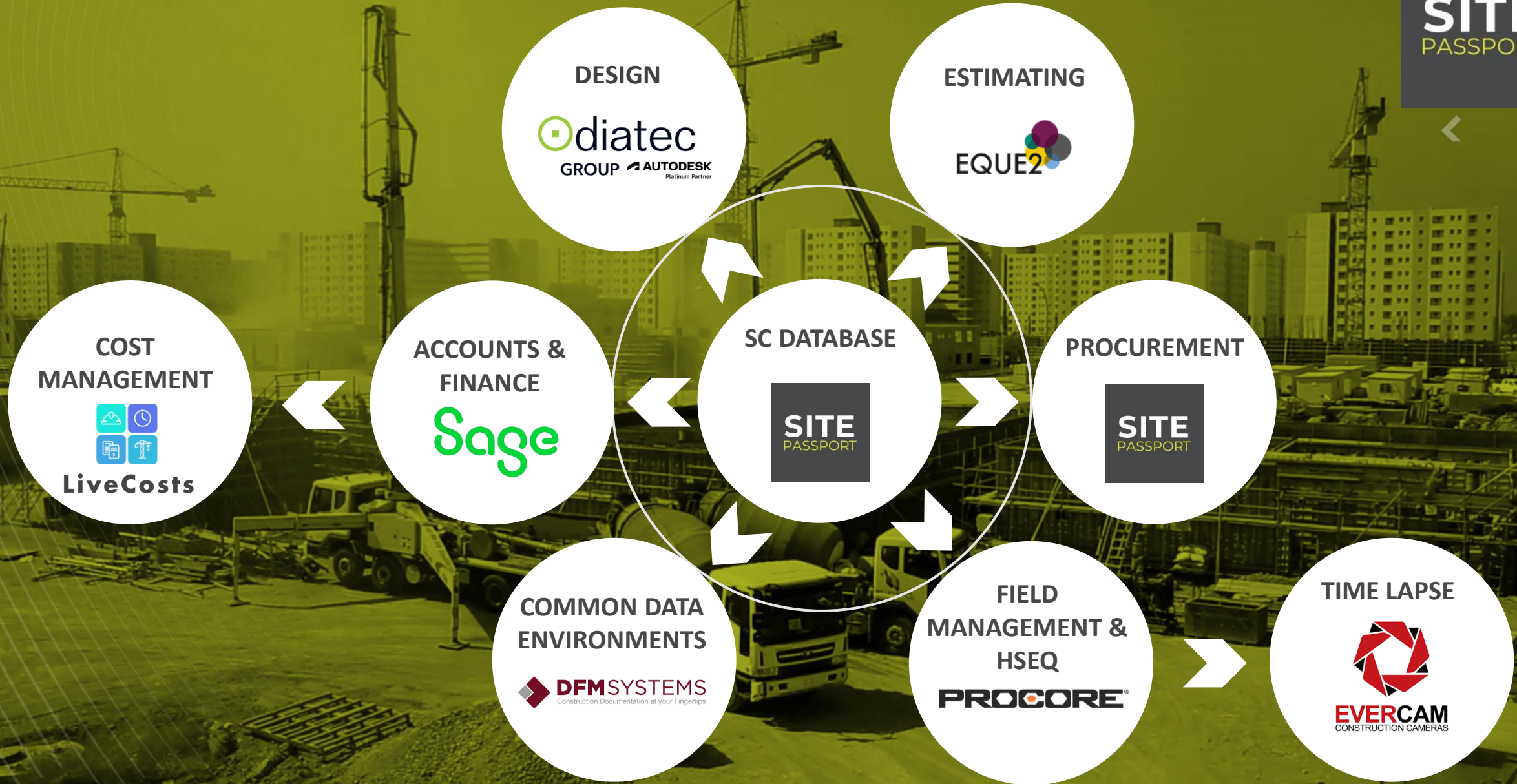Multiple disconnected single point solutions

All-in-one Solutions & ERP

Small no. of integrated best-in-class solutions

Technology

Change

what's
in it for
ME?

INDIVIDUAL USER PERSONAS

MARK, 22

DEMOGRAPHICS

Rents a 2 bedroom apartment in uptown Charlotte, NC with old teammates from lacrosse.

Recently single and using dating apps. An only child and rescued a puppy 4 months ago.

Currently an intern for a large sports management company and a bar tender at a high end cocktail bar on the weekends.

Graduated with a 3.8 in Health Sciences from UNCW. Owes $28,000 in private loans.

BEHAVIORAL IDENTIFIERS

Hobbies include eating out, lifting weights, playing club lacrosse, drinking draft beer, tailgating for UNC, and watching live music.

Wants fast shipping. Values a low price. Prefers online marketing, light colors, and simple websites.

Owns an Android and shops on mobile with referrals from social media such as Instagram and Facebook.

Personal goals to be out of debt by 2024, to be engaged in 4 years, and to work in a university sports medicine department.

Prefers chat systems for customer service and support. Values quick responses and 24 hour availability.

Shops online between 7pm-1am. Buys during pay periods at the end of the month and often uses promo codes.

Studied abroad in Chile. Can speak Spanish and some Italian. Travels on a budget and prefers hostels to hotels.

Very fit and active but has a bad diet due to eating on a budget and drinking often. Seeks out health information daily.

JUSTIN, 31

DEMOGRAPHICS

Rents a 1 bedroom apartment in uptown Atlanta with his partner. Saving to buy a home next year.

Recently engaged to his boyfriend of 5 years with plans to marry in NYC in the winter.

Works 40 hours a week in a 5 star hotel as a superintendent with a net income of $120,000.

Graduated from a community college with honors and held office in 3 on-campus clubs.

BEHAVIORAL IDENTIFIERS

Hobbies include vegan cooking, yoga, monthly massages, playing the drums, volunteering, drinking cocktails and watching local plays.

Wants free shipping on large orders. Values quality and privacy. Extremely brand loyal. Prefers email marketing.

Owns an iPhone and tablet. Shops on this tablet with referrals from small marketing and promotions.

Personal goals to become a general manager within 4 years and to purchase a suburban home after his wedding and honeymoon.

Prefers to call for customer service and support. Values follow up summery emails and easy to read directions.

Shops online between 8am-3pm and makes multiple returns. Uses Paypal at checkout.

Travels in the USA twice a year to visit family in Maine and California. Prefers long road trips and holiday travel.

Cooks very healthy and with local products. Has great self care and is very active.

MAGGIE, 52

DEMOGRAPHICS

Owns a 4 bedroom home in coastal NC and 2 high end cars. Lives in a suburban gated neighborhood.

Happily married for 12 years with 2 sons and a house hold income of above $220,000.

Human Resource Director of a small media company for 5 years with a $88,000 salary.

Well educated with an HR degree from a state university. Graduated without debt.

BEHAVIORAL IDENTIFIERS

Hobbies include reading, playing tennis, networking at the country club, being involved in youth groups and visiting the beach.

Wants a simple product. Values quantity and brand image. Prefers print marketing and bold graphics.

Owns an iPhone but makes purchases online with a desktop Mac computer. Needs a simple check out system.

Personal goals to retire by age 65, to own a vacation home on the Spanish Riviera and for her sons to attend an ivy league university.

Strong need for customer service and support. Values face to face communication and rewards systems.

Shops in department stores after 5pm. Buys in bulk on sale items. Referred by a previous client.

Well traveled in Europe. Prefers traveling in off peak times in chain hotels and loves pre-planned travel like cruises.

In very good health but very busy and often stressed. Visits group exercise programs.

ACCELERATE – IS THE CUSTOMER ALIGNED AND READY TO BUY?

(A) **Access to all Decision Makers**

(C) **Clear Vision of Success**

(C) **Clear on Buying Process**

(E) **Established the Pain Point**

(L) **Level of Priority is High**

(E) **Earmarked Budget**

(R) **Red Flags and Objections identified**

(A) **Advantage over Competitors**

(T) **Tangible Impact & ROI**

(E) **Endgame Plan in place**

SITE PASSPORT

Lateral

REQUIREMENTS SPECIFICATION – A GOOD EXAMPLE

Sub-Contractor Database Requirements

	1	Basic Requirement
	2	Preferred Requirement
	3	Optional Requirement

Please rank each item on the list on a scale of 1-5 with 5 being the most important and 1 the least important

Type	#	DTM Item Name	DTM Item Description	Item	Availability Status (Yes/TBC/No)	Delivery Comments	Priority	Comments/Notes	AN notes 2/3/22
Major Features									
A - Major Feature	2	Subcontractor Tender List	Tick to add' to exportable SC tender list, potentially integrate tenders for comparison	Used in daily tasks, tender comparisons & enquiries, etc.			1	Must be able to generate a tender subbie list for a tender based on filtered criteria. A a minimun a list that can be exported to excel.	Software should be capable of sending and receiving enquiries, allowing for comparisons etc. Data should be exportable to excel
A - Major Feature	6	Live Projects List		List of current live project within XXXXX			1	Should be able to identify if a Subbies is 'live' on a project - possible tick off on FA agreement? Already available on XXXXX. Should be able to highlight currant live projects	Should identify where a vendor is on a current live XXXXX project
A - Major Feature	9	Project Evaluation	Multiple criteria	Performance rating. Programme/Quality/Environmental			1	We may need a facility for external references for new subcon - See AL below. Ideally from inputted de-brief scores	Basic function to allow for the vendor to be rated across multiple criteria.
A - Major Feature	13	Completed Projects History		List of completed within XXXXX			1	Already available on internally	
A - Major Feature	14	Recommendation Status & 'blacklisting'	Recommendation Status for companies, including auto 'Non-available' based on average score (with possibility to mgmt. over-ride)	Generate monthly 'black list'			1	Blacklisting of subcontractors while retaining their profiles	See item 9. Need functionality to allow for a vendor to be deemed unsuitable based on a combination of individual project ratings and or a collation of multiple project scores. Override by specific staff to be allowed. System to block future enquiries to be sent pending
A - Major Feature	42	Prequalification	Available - customisation required if XXXXX input rather than SC	Prequalification process within database -AN			1		Can the system support a prequalification system for new vendors
A - Major Feature	17	Project Ratings - HSE	Inc. multi-HSE ratings, accident numbers	H&S Records/Rating/Historical Performance			2		Basic function to allow for the vendor to be rated across multiple H&S criteria. Document storage and prompt prior to expiry dates. Ability to collect accident data
A - Major Feature	19	Claims Logging	Log claims receipt & track no. received	Claims History			2		Ability for the QS to flag if a Claim is received. Need to be able to easily identify a claims conscious vendor
A - Major Feature	20	Subcontractor Documentation Entry	Documentation upload & expiry monitoring	Facility for direct entry by subcontractors - prompts for expired insurance, etc.			2	Critical to avoid manual administration by XXXXX	What is the practicality of this. Subcontractors may not do what is required. Note prompts for renewals
A - Major Feature	25	Vendor Staff Appraisal	Overall rating of individual staff, based on projects	List of Resources			2	Ability to enter named preferred or high performing Subcontractor staff. What do we mean/need here?	Need to enter names of vendors high and low performing staff
A - Major Feature	30	Order Placing		Place order through software.			2		
A - Major Feature	16	Subcontractor Documentation		Insurances - sub-contractor upload and prompt			3	ideally uploaded by SC but then approved internally	Whether by XXXXX or vendor, system to store and provide prompts prior to expiry. Also the ability for our insurance broker to vet and approve insurance

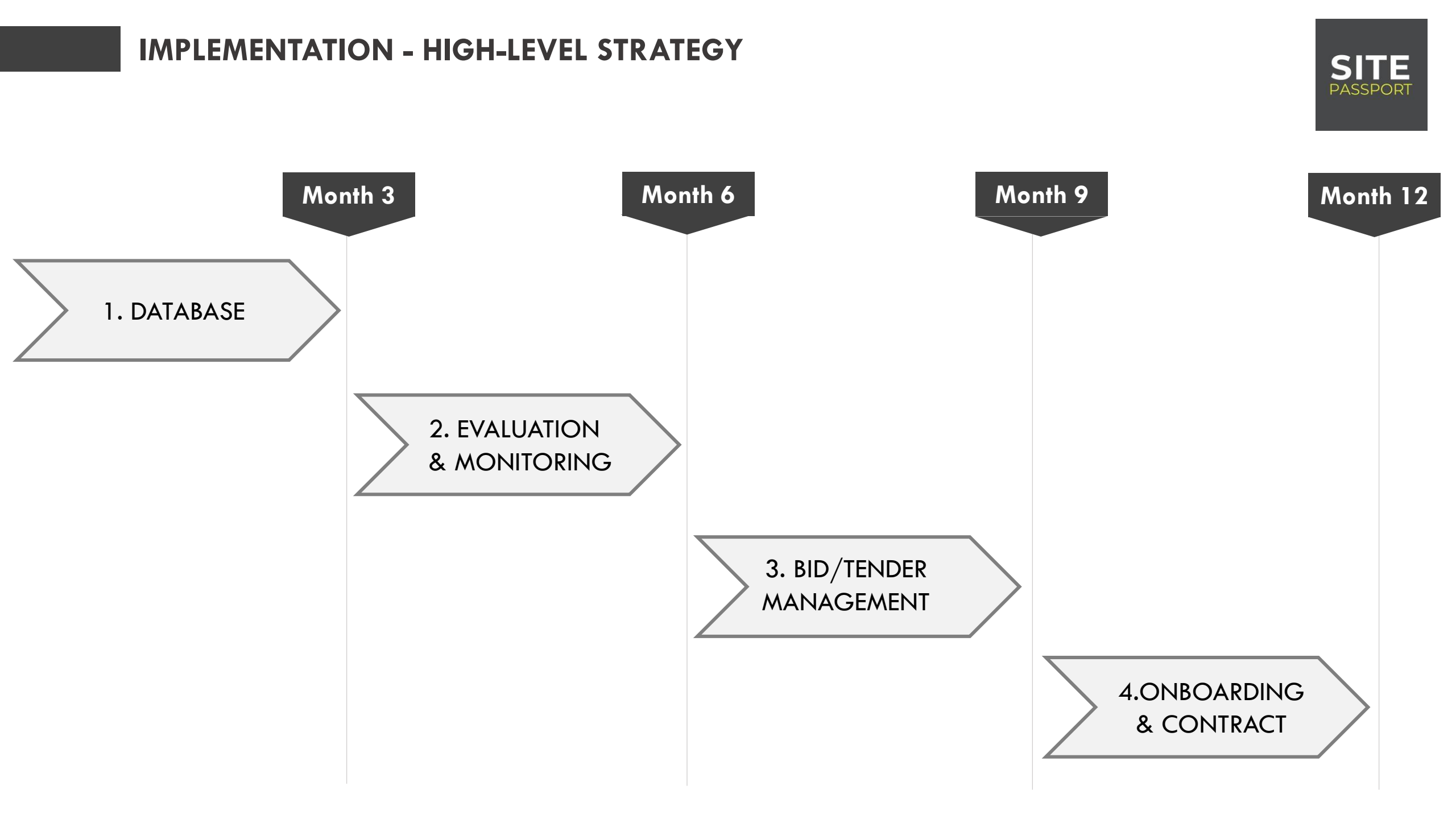# IMPLEMENTATION – HIGH-LEVEL STRATEGY

Month 3 **Month 6** **Month 9** **Month 12**

1. DATABASE

2. EVALUATION & MONITORING

3. BID/TENDER MANAGEMENT

4. ONBOARDING & CONTRACT

1.0 DATABASE

1.1 Database + Search Engine
- Set up to access database and search engine is immediate with simple user registration.

1.2 Join our Supply Chain Campaigns
- Customer provides list of priority trades.
- SP and Customer agree the invitation email and the list of subcontractors to send the email to, for each trade.
- SP fully manages the process and the Customer team simply views the live dashboard of results.

2.0 BID/TENDER MANAGEMENT SYSTEM

- Set up is immediate. 45 minutes training required to start sending tender enquiries.

3.0 EVALUATION & MONITORING

3.1 Prequal Questionnaire
- Customer shares current PQQ question set with SP; SP cross references with SP standard PQQ and reverts with suggestions.
- Once agreed, SP implements and shares online PQQ with Customer team for final approval.
- Initial rollout of service fully managed by the SP team. Training provided on the *Review & Approval* process.

3.2 Subcontractor Performance Ratings
- The only input required from Customer is to confirm the various Rating KPI's and to schedule out which management personnel are connected to each project to enable live ratings.

4.0 SUBCONTRACTOR ONBOARDING AND CONTRACT

4.1 Pre-ward Meetings and End of Project Reports
- Customer shares current question set with SP; SP cross references with SP standard set and reverts with suggestions.
- Once agreed, SP implements and shares online forms with Customer team for final approval.
- Initial rollout of service managed directly by the SP team. Training provided.

4.2 Subcontract & Main Contract Management
- Similar process to above