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iiIQ

InQuarry

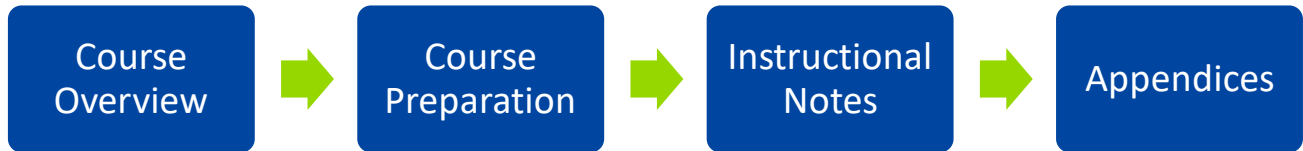
Web Application

Facilitator Guide

Release 1.0

STRUCTURE OF THE FACILITATOR GUIDE

This guide is organized into 4 sections:



COURSE OVERVIEW

This section provides the description and duration of this course, the course outline details each section of the course including the duration of each section. Finally, the learning outcomes are listed to guide you as a Facilitator to actively monitor that the outcomes are as expected amongst the participants.

COURSE PREPARATION

This section will list the materials needed to facilitate a session. The environment set up considerations will assist you in planning for in-person classroom sessions as well as virtual classrooms.

INSTRUCTIONAL NOTES

This section provides step-by-step instructions to facilitate a session using the PowerPoint slides and InQuarry. The notes include what to say, what to do, and other prompts to ensure that the session is engaging and effective.

APPENDICES

The appendices include resources for the Facilitator.

Course Overview

COURSE OVERVIEW

WORKSHOP DESCRIPTION

This workshop is designed to introduce InQuarry to Estimators in preparation to fully integrate this platform.

DURATION

This workshop is estimated to last 2 hours. The length may vary depending on the participation of the attendees.

COURSE OUTLINE

The course is divided into 9 parts. In the chart below lists the number of slides per part and the time allotted for each part.

Part 1: Introduction	Slides: 1-4	Duration: 9 minutes
Part 2: How We Work	Slides: 5-9	Duration: 19 minutes
Part 3: Bid Overview	Slides: 10-13	Duration: 20 minutes
Part 4: Bid Detail	Slides: 14-16	Duration: 29 minutes
Part 5: Competitive Intelligence	Slides: 17-18	Duration: 5 minutes
Part 6 Spot Check	Slides: 19-20	Duration: 5 minutes
Part 7: Bid Review	Slides: 21-22	Duration: 21 minutes
Part 8: Wrap Up	Slides: 23	Duration: 5 minutes

TOTAL DURATION: 2 HOURS

LEARNING OUTCOMES

As a result of this course, Estimators will perform the following in InQuarry:

- Locate bids
- Review details of a bid
- View and update the status of a bid
- Create a competitive bid
- Verify all steps of the bid have been taken

Course Preparation

COURSE PREPARATION

MATERIALS CHECKLIST

The following materials are needed to facilitate this workshop. Please note materials that are needed for each participant.

Technology/Equipment		✓
Projector or MS Teams to deliver training		
URL for IQ Stage Environment		
URL for IQ Production Environment		
Facilitator Materials		✓
PowerPoint Deck		
Facilitator Guide		
PARTICIPANT MATERIALS (for each participant)		✓
Username and passwords for Stage Environment (current [REDACTED] credentials)		
Username and passwords for Production Environment (current [REDACTED] credentials)		

ENVIRONMENT SET UP

When the session is scheduled, it should be determined whether the session will be conducted in a classroom or in a virtual environment. The materials will remain the same.

Classroom

For in-person sessions scheduled to take place in the classroom, please consider:

- Seating for every participant
- Internet access

Virtual

For virtual sessions scheduled, please consider:

- Adequate preparation of the virtual platform to host the session
- Capability to view the participants to check for questions, understanding, and participation
- Chat space for participants to type questions or comments
- Capability to monitor the chat

Instructional Notes

INSTRUCTIONAL NOTES

Refer to this key to carry out the instructions throughout this guide. Each icon indicates how to approach each step listed in the instructional notes.

	Duration Time
	Alert Important Remember
	Click for animation Click for next slide
	Explain Say Tell
	Ask
	Activity Interaction
	Do Facilitator note
	Slide
	InQuarry demo



Important: When displaying the PowerPoint in a training session, be sure to use presentation mode. This slide deck contains animations that are only visible in presentation mode. To activate slide show mode, navigate to the **Slide Show** tab and select **From Beginning**.

Part 1: Introduction



Total Slides:
4



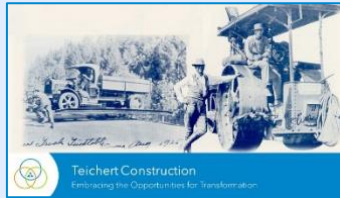
Total Duration:
9 minutes



IQ Demo:
N/A



Slide 1



5 minutes



Welcome and greet participants to the session as they arrive.



If the participants know each other already, skip the introduction activity



Introduction Activity

Before we begin our training, let's take a moment to introduce ourselves.

Facilitator shares:

- Name
- Job Title
- Work Experience at [REDACTED]
- Most memorable experience at [REDACTED]

Participants share:

- Name
- Job Title
- Work Experience at [REDACTED]



Hi everyone and welcome to our training course Embracing the Opportunities for Transformation. During this time, we will review Project Augusta and learn about InQuarry, which is the web-based application that will become our companion in the project life cycle.



Click for next slide

SLIDE 2



Slide 2

Learning Agenda

- Navigate the user interface for the web application.
- Demonstrate analytical mastery by interpreting data on the web application.
- Confidently use IQ to complete the bid analysis and review on future bids.



2 minutes



As you know from your previous training session, the app is quite large and will only continue to grow. So, we're going to make this simple and straight forward – and give you a lot of time in InQuarry (IQ). So, what will we prepare you to be able to do after training?

- *The class will be introduced to the web-based application and shown a demonstration. This allows the participants to become comfortable navigating inside the web-based application. Plus, the demonstration reveals how the web-based application makes our work more accessible, allowing us more opportunities to contribute to making ██████ successful.*
- *The web-based application streamlines several tasks, including performing calculations and putting more information at our fingertips. As a result, this allows us to use the information to increase our competitiveness and work efficiency. In addition, this portion of the training will give us the ability to practice our analytical skillset.*
- *Our main goal for this session is to make sure you are confident in navigating in InQuarry to complete the bid analysis and review any future bids.*



*Because IQ is relatively intuitive, but large, the training will **not** explore the web application in-depth or review all the functions/features. Unless you want to hang out with me for a few days. No? Well, good thing we're focusing on the most common uses you'll have with the tool and after today, you'll feel confident using and exploring the tool. Besides, we know that you know how to do your job, and we respect it.*



Of course, this training isn't your only opportunity to learn how to use IQ. For detailed information and instructions for IQ, participants are highly encouraged to reference the User Guide, which will be available in the Augusta Content Hub in SharePoint.



Before we jump into the application, the tool itself is only one pillar to our success. Let's review Project Augusta and the role of the tool and you in its success.



Click for next slide

SLIDE 3



Slide 3



1 minute



Construction has flourished for 130+ years because our valued employees perform excellent work. We should be proud of this because our history is built on employees like you who want to build for America. Your hard work, ability to change and dedication to quality built the infrastructure for communities and businesses to grow.



Click for next slide

SLIDE 4



Slide 4



1 minute



Whether you've been with us for years or days, you know that [REDACTED] is successful because of our ability to innovate and work together. And these same elements are what is going to sustain our success into the future. We are not followers, we're leaders and pioneers. This is the reason why Project Augusta began – to sustain our success into the future. Let's take a few moments to understand more.



Click for next slide

Part 2: How We Work



Total Slides:
5



Total Duration:
19 minutes



IQ Demo:
Interface &
Login



Slide 5



3 minutes



Alert: This slide will be delivered by Ed Hernnberger



You recently attended an early adoption kick-off session that showcased the three pillars of Augusta: people, process, and technology.

We want to do a very brief recap to bridge the pillars to the technology – continuing to emphasize ‘why we designed and built the technology’ in the first place.

- *Helping Estimators during the Bid Analysis & Review avoid omissions and oversights.*
- *Facilitate Estimator Hand-Off through effective communication.*
- *Manage risk End-to-End.*
- *Enable a learning culture through job retrospectives.*
- *Capture data throughout the project lifecycle, driving knowledge-build through analytics.*

These core functionalities will drive business value through continuous improvement.

Today, we want to bridge the technology and process. Not just process changes, but your commitment to these changes through a renewal of accountability and focus on our best management practices across construction services.



Any questions before we get started?



Click for next slide

SLIDE 6



Slide 6



1 minute



The rest of our session today will be focused on exploring the tool.

As you know, the web application is online and captures, stores, and processes data. The most significant advantage is that the web application lets us easily view and consume essential and even unavailable or overlooked information.

This gives [REDACTED] (you) the ability to:

- Rely on evidence to make intelligent decisions*
- Learn from our mistakes and success stories*



Click for next slide

SLIDE 7



Slide 7



1 minute



For today, we're focusing on the Bid Analysis and Review which is the focus of version 1.0 of InQuarry and all of the associated processes the tool impacts. The next version which will happen later this year will focus on the Estimator handoff to the PM. You're the early adopters so that means you're the select few that will be using InQuarry for now. That comes with responsibilities: we look forward to your feedback and correct tool usage so we can gain valuable data and insights.

We covered this information in the Kick Off session earlier.



Any questions before we start jumping into the tool?



Click for next slide

SLIDE 8



Slide 8



6 minutes



Now, for the rest of our time today, we're going to physically explore the application. Here's how this is going to work:

- First: I will provide a walk-thru of the web application. For each screen, I will perform a demonstration that will focus on the essential parts to understand and explain the tasks you need to do. Each of these steps are important, so do not jump ahead.
- Second: After my demonstration, you will be directed to enter the web application and repeat several of my tasks during the demonstration. For some of your processes, you will gain additional practice through activities.



So, you know, InQuarry (IQ) is currently hosted in 2 environments:

- **Production Environment:** This is the live version of the web application. Tasks performed inside of IQ will on actual bids and will be made into permanent records.
- **Staging Environment:** This is a test and training environment and therefore what we'll be using for today's training. Why? Because we want you to explore, try, and make mistakes. The Staging Environment is separate from the Production Environment; the data, tasks performed, and mistakes made in this environment will not impact the project lifecycle.



Some other essential facts to know about the Staging Environment we'll be in today:

- The data (bids, costs, etc.) available is limited. In addition, each bid uses a combination of actual data (from previous jobs) and fabricated material. As a result, not all the information will be cohesive or logical.
- Occasionally, the user interface will have different functions or features found in the Production Environment.
- Because this is our testing area, you may encounter more bugs or other issues.



To achieve the best user experience, both **Google Chrome** and **Microsoft Edge** are the best internet browsers to use when accessing InQuarry, both in the Production and Stage environments. The other browsers may also be able to access InQuarry. However, the user experience may not be as friendly.



Provide participants with their Stage Environment login papers. Papers will include the following:

- Directions to open a Browser
- URL for Stage Environment
 - **https://...../ (TBD)**
- Participants will use their [REDACTED] credentials (email and password).



Alert: In both the production and stage environments, participants will receive prompts to authenticate on multiple occasions. Inform the participants to select the option to **agree/accept**.



Allow time for all participants to log in. Walk around the room and provide assistance as needed.

Contact XXX (TBD) if there are any technical issues.



Change screen to show InQuarry.

InQuarry demo: navigation

Have participants follow along with you in real time as you demonstrate the following:

1. Open the browser and access Stage Environment by performing the following steps:
 - Enter the Stage Environment URL inside the address bar and navigate to the web application.



Best practice is to bookmark the Stage Environment or have the URL readily available to copy/paste inside the address bar.



2. Select **Go to Login**.



In the staging environment, when you see the prompt **Stay signed in?** Direct the participants to select **No**.



You and the participants may receive a **Microsoft Authenticator** prompt to approve or accept. Select **Yes**.



You may notice that your screen looks a little different than mine. This is because IQ is a user-based application. The role of the user determines the interface as well as the functions and features available. This means you see what you need to see and nothing you don't. For instance, chief will have access to all bids that their Estimators are working on in IQ, but each Estimator will only see their own bids.

Another essential feature is that the bids available on InQuarry are user-specific. For instance, Estimators will only view the bids that belong to them. Likewise, Chief Estimators will only view the bids assigned to members of their team. This is going to help us only focus on the tasks and bids that we need to perform on.

Now that we're all logged in, let's take our next steps.



Change screen to show PowerPoint

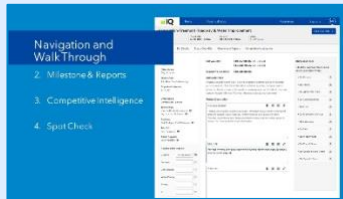


Click for next slide

SLIDE 9



Slide 9



8 minutes



Before we take a deep dive, let's get the lay of the land – so to speak. First, we'll do a quick high level of the main screens. This is just to understand how to navigate the tool and get a quick understanding of when you would be in each screen.

Don't worry. We'll deep dive right after this.

For the 1.0 and 1.1 version, InQuarry is designed to be your companion. Although InQuarry will streamline several forms and tasks plus reduce your touchpoints in other systems, it does not replace the external systems such **Vista, HeavyBid, Cosential**, and others.

One of InQuarry's features is that it fetches data from the external system and stores it inside the web application. This makes it convenient for you to locate and store your information. However, it is important to know that the information entered/revised inside InQuarry does not transfer to the external systems; the data only stays within InQuarry.

Please update your bid on the external systems as needed.



Change screen to InQuarry



After accessing InQuarry, **Assigned Bids** is your landing screen. It displays the bids that you have been assigned or given a sub-task. The screen organizes the bid by their name and displays the status and, when available, the bid date.

Chief Estimators will be able to view the bids that are assigned to you as well as the bids given to the other Estimators in your group.

Chief Estimators will also have an additional feature that is not found in the Estimator user interface which is the filter. The filter allows you to sort and organize the bids from your direct reports based on Assignee, Status, and Office. Plus, the filter enables the **Chief Estimators** to organize the table by bid date.



InQuarry Navigation (IQ Overview)

1. Choose bid **___XXX___**
 - After selecting the bid, you are directed to the Bid Overview. The screen displays information from Cosential and provides us the opportunity to enter notes, see similar historic jobs, and organize your files.
2. Choose **Bid Details**
 - The screen helps Estimators with cost analysis so that the analysis is more consistent and easier for the Estimator. Data is obtained data from HeavyBid, and InQuarry to compose a historical cost comparison.
3. Choose **Milestone & Reports**
 - This screen provides convenient web-based templates to enter the necessary information needed to create reports for milestones and meetings such as Bid Review and Estimator Handoff.
4. Choose **Competitive Intelligence**
 - This provides a convenient form to organize and document the advantages and disadvantages between [REDACTED] and the competitors. This provides additional information that can be used during analysis to improve the competitiveness and profit margin of the bid.
5. Choose **Spot Check**
 - This reviews specific data fields within your bid versus historicals and provides feedback on these key fields if data may be missing or incorrect.



Now that we've seen the main screens, let's start our venture into the tool by looking at our current processes and how IQ will act as our companion tool.



Change screen to show PowerPoint



Click for next slide

Part 3: Bid Overview



Total Slides:
4



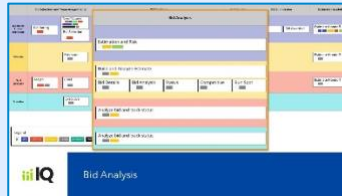
Total Duration:
20 minutes



IQ Demo:
Bid Overview



Slide 10



3 minutes



Here is our process map. It outlines each step we take in creating a bid – from the initial team assignment to the bid handoff with the PM.

*We all know that there are many essential steps needed to create a successful bid and each of us plays a unique roll. For example, you can see that **Chiefs** in their flow have duties such as assigning the bid and completing the bid review with the **Estimator**.*

Throughout today's training, we will zoom in on where we are in our process so we have a better understanding when we should use IQ.



Click for animation



Let's look more closely at the Bid Overview section. But what exactly does that mean to you while you're working on your bid? Let's take a look at our bid process map.

As you can see, what you'll use on the Bid Overview screen is part of the Bid Analysis. Not only that, but the Bid Overview screen replaces the need for JIS as well as JHA! Why? Because the Bid Overview screen displays information from Cosential plus HeavyBid and allows you to enter notes and organize your files.

The screen presents a range of information which can be used to create a bid, ensures no omissions, assigned a markup percentage and price for bid submission which can be used during your review with the Chief Estimator.



Click for next slide

SLIDE 11




Slide 11






3 minutes




Let's explore some of the features of the Bid Overview screen with will be utilized to create your bid. Remember, we don't have time to go into detail on everything on this screen.

If you have any questions, please ask, but remember, you can always reference the User Guide for detailed information and instructions on anything covered today and things not covered today.



Change screen to InQuarry

- 

InQuarry Navigation (Bid Overview)

 1. Choose **Bid Overview**
 - The information shown here is pulled from Cosential, however, you do have the ability to add information to key areas on this tab and some others that we'll cover later today.
 2. Show **Teams Icon**
 - One feature that I enjoy is the ability to easily send a message on MS Teams to anyone who is tagged on this bid. On the left side of the screen, you will observe the MS Teams icon. When you click on the icon next to a name, it will open a Teams chat window with that person.
 3. Show **Additional Bid work by**
 - When you begin to type inside the entry box, InQuarry will type-ahead the names of workers that you might assign the task to. It is important to know that this record stays within InQuarry and does not transfer to external systems. Please update the records in the external systems as needed.
 - Show **Project Descriptions**

- You can describe the specs, plan documents, and your observations for the bid by typing inside the Project Description box. The description entered this box auto-populates into the bid review, executive review materials, and documents for the Estimator handoff.
4. Say: Show **DBE/GFE**
 - Estimators are to type their notes for Disadvantaged Business Enterprises (DBE) and Good Faith Efforts (GFE) to recruit DBEs effort that the Estimator & support staff have done; plus, other notes related to DBE/GFE can be entered in this field.
 5. Show **Unknown**
 - The Unknown is your virtual scratchpad. There is where you can jot down ideas, informal notes, brief messages, preliminary writing and more.
 6. Bid details on the left and top are pulled from Cosential and cannot be changed here.



Change screen to show PowerPoint

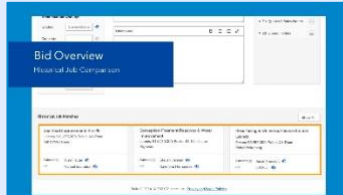


Click for next slide

SLIDE 12



Slide 12



5 minutes



How many of you have been working on a bid and wanted to find a previous job that could help you can use as reference?

Answers will vary.



Was it easy to find, especially if it was years later?

Answers will vary (This question looks to validate that finding previous bids that were similar can be problematic).



It can be frustrating to find an older bid, especially if it was years later. Another section of InQuarry can help you with that. It's called Historical Job Matches.

This screen will show a few (or more) historical jobs that closely resemble the bid you're starting to work on. Of course, the question becomes, what does this tool filter by? Well, historical job matches are based on the following:

- *Market code*
- *Job type*
- *Bid value*
- *Location (tax code)*
- *Department (only if there are not enough jobs in the location)*



Click for animation



Let's see what this looks like in action.



Change screen to InQuarry



InQuarry Navigation (Historical Job Comparison)

1. Select **Bid Overview**
2. Select **XXX Bid**
 - **Say:** Notice for this bid, a few historical jobs have popped up on these cards. These cards contain some helpful information as well as the job number and job name to more easily look the full job information up in HeavyBid. By the way, want to see more jobs?
3. **Add Jobs by Job Number or Name** data field
 - **Say:** From here, you can display more jobs that closely match your current bid by entering the Job Number or Name. If there are jobs that are not as close as you'd like, you can also remove matched jobs by hitting the trash can icon on that job card. They will be removed for this bid but can be added back and will be available on future bids with similar criteria.



Change screen to show PowerPoint



Click for next slide

SLIDE 13



Slide 13



10 minutes



The last section we'll cover in the Bid Overview screen are the Bid Folders. This is where you can store all documents related to you bid.



Let's talk about your current method of document storage. What do you like about it?

Possible Answers:

- Online via VPN: so, can be shared
- On paper: I prefer to write things out as a scratch pad
- On my computer: convenient since I'm on here anyway and don't need to connect to VPN



What don't you like about our current method(s)?

Answers:

- Inconsistency: we use different methods which make documents stored everywhere so I'm not sure where to find something later.
- A VPN is required (when out of office) if not stored in a shareable location which can be annoying
- Inconsistent folders and naming convention



It sounds like we could benefit from some consistency and keeping our documents easily in one place. This way, we don't have lost or misplaced files – even years down the road.

This is a great process change that IQ provides: the ability to store and get your files in one location...all without the need of a VPN connection and using intuitive templates to make it much easier.

The Bid Folders is a SharePoint directory in Azure cloud integrated within InQuarry. This is where we can upload our files and be able to download them as needed.

Let's look at it in action!



Change screen to InQuarry



InQuarry Navigation (Bid Folder)

1. From your **Assigned Bids** tab, select **XXX (TBD)** Bid
2. Land on **Bid Overview** tab
3. Notice how the folders are organized. To standardize the folder structure, the folders are templated and cannot be modified or renamed in IQ (Folder names can be renamed in SharePoint).



Bid Documents Activity

1. Direct participants to the Bid Folder Protocol PDF on the Content Hub to know where each type of bid document should go in the bid folders.
2. Participants will open a folder and upload a file from your laptop.
3. Participants will open a folder and upload 2nd file from your laptop.



Walk around the room to assist participants and troubleshoot as needed.



Change screen to show PowerPoint



Click for next slide

Part 4: Bid Detail



Total Slides:
3



Total Duration:
29 minutes



iIQ Demo:
Bid Detail



Slide 14



4 minutes



Now that we've covered some of the highlights found on the Bid Overview screen, let's move to the next tab: The Bid Details. Where does this fall in our bid process?

As we move forward in the bid lifecycle, the Bid Details tab helps us with two tasks: Analyze data from HeavyBid within InQuarry to perform the historical cost comparison plus provide us guidance questions to think about the work that may not have been considered.



Click for animation



One big change to our current process because of iQ is that we can now document the risks continuously through the Bid Analysis as they are known. Previously, most of us waited until the end of the Bid Analysis. That's a lot of stuff to have to remember. This process change ensures that both big and small risks are captured and not be missed. Plus, the information is relevant.

First, we'll focus on how iQ can help you with your cost analysis.



Click for next slide

SLIDE 15



Slide 15



15 minutes



Let's talk about your current method of completing a cost analysis. What do you like about it?

Possible Answers:

- Excel spreadsheet: I use a pivot table in my spreadsheet and I'm now familiar with it
- I'm supposed to run an analysis?



Ask: What don't you like about our current method(s)?

Possible Answers:

- I HATE Excel/never understood pivot tables
- It takes so long and I'm afraid I've done it wrong anyway
- I only have time to review a few data sets because I need to do this by hand. This means my data sample may not be accurate.



What happens if the cost analysis is performed incorrectly or is not completed at all?



Have senior leadership and/or Chief Estimators share their experiences with this opportunity for improvement. What does it cost them in time? What does it cost [redacted] in money?



Click for animation



One of my favorite benefits of InQuarry is that all the math needed to complete a cost analysis is done for you!

The data is automatically pulled from HeavyBid (current data) and Vista (historical data) into InQuarry to show historical job amounts.

Each section displays the same fields, only the data changes because it is driven by the work type. Of course, we need to know how to use it and read it.



Change screen to InQuarry



You can sort the data by three different ways:

1. **Activity code rollup** (shown on this slide)

- As you can see, there are three different types of icons next to the calculations. These tell you:
 - **Grey Arrow:** Estimate is lower than average based on historical
 - **Red Arrow:** Estimate is higher than average based on historical
 - **Target:** The estimate is within average based on historical
 - Of note: it will show you the high and low for the range around the media cost.
 - Also of note: when you select the carrot next to the total cost in this view, you will see a list of the jobs that contributed to this particular Activity Code's cost analysis.

2. **Activity code**

- When sorting by Activity Code, it shows the line items for each activity code. You can also expand the activity code by clicking the individual line item's carrot at the far right. This revealed information gives you the information that contributed to that median so you can make a more informed decision.

3. **Bid Item**

- When sorting by bid item, you can see all of the codes associated with that bid item bucket. This view most closely resembles the view you see in HeavyBid.

As you can see, when viewing by activity code rollup, each table sorts the information by the Quantity, Units per hour, Man hours per Unit, Cost per unit, and Total cost for each Activity Code. Let's put this knowledge to the test and determine if this bid is likely too high, too low, or seems about right.



Cost Analysis Activity

1. Use the hover and jobs pull down features on 3 different activity codes to check out the relationship between the bid cost and historical cost range and to see the jobs that contributed to each historical range.
2. Remind learners we're evaluating XXX bid.
3. Give the groups 3 minutes to determine:
 - a. Is the XXX, XXX, and XXX activity code too low, too high, or accurate
 - b. Rationale for choice (I.e. If something needs to be changed, what?)
4. Each group will present their decision for 1 minute.
5. *Answer:* TBD depending on XXX bid



Change screen to show PowerPoint

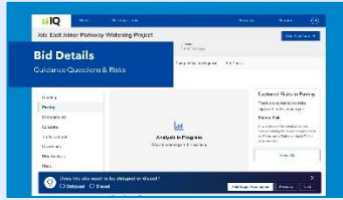


Click for next slide

SLIDE 16



Slide 16



15 minutes



You may have noticed there's more to the Bid Details tab than just the ability to aid in your cost analysis. It also includes the ability to track your risks. Identifying risks is extremely important to the project lifecycle, which is why InQuarry makes it efficient for you to enter them. The two ways to add new risks and opportunities are:

- *Using the guidance questions (not all encompassing, but helps with ones that are frequently overlooked)*
- *Add Risk Item + button*



Click for animation



Let's start with showing how the guidance questions work.



Change screen to InQuarry



InQuarry Navigation (Guidance Questions)

1. From your **Assigned Bids** page, select **XXX (TBD)** Bid
2. Land on **Bid Details** tab
 - When you initially enter a work type for each bid, guidance questions will appear after a couple of minutes. The questions listed are based on the type of bid you are creating and market code. In addition, there is the option to enter the scope assumption.
3. Respond to a **Guidance Question**



If no guidance question comes up, click the floating blue icon under the left navigation bar to trigger a guidance question.

- The prompts provide you the ability to dismiss or answer a guidance question and add an associated risk. After the prompt is dismissed, it will only reappear one more time for this bid. So best practice? Don't dismiss them when they come up unless you don't know the answer yet. If you dismissed it twice, you can still access the complete list of guidance questions in the Bid Review with Chief (don't worry, we'll cover that later).
- Remember how we talked about the importance of entering risk? When answering the question prompts, if you identify there is a scope assumption, it will prompt you to identify what the risk are.



As you may have already seen on this screen, there is another option to record a risk to your bid.

Where do you think it is on this screen?

Answer: The **Add Risk Item +** button on the top right of the screen.

That's right! Let's explore how this works.



InQuarry Navigation (Add Risk Item +)

1. From the **Bid Details** tab, choose the **Add Risk Item +** button.
 - As you can see, after you have selected to add a risk item using the button, a pop-up appears to complete the Scope Assumption, Risk, and Opportunity form.
 - You'll also see this **+ Add Risk Item** button on other tabs. Why? Because it's that's important and, like we said, can and should be done as risks are identified.
2. Fill in simulated data for the **Scope Assumption, Risk, Opportunity** form. Encourage the class to enter a risk from their last (or current) project they've worked on to see how this form can be used.
 - You'll notice that the risk type, impact area, and bid item are now as a pre-filled drop down (risk type and impact area) or type ahead (bid item). This makes things easier, increases consistency, and this data can now be used as part of our analysis.



InQuarry Navigation (Add Risk Item Captured Risks)

1. From the **Bid Details** tab, choose the View All button in the Captured Risks list on the right of the screen.
 - By choosing this feature, you can review all of the risks you have identified as well as add new risks here as you notice risks missing.

Last, but definitely not least, you can add a risk by reviewing the Captured Risks. Let's see how this works.



InQuarry Navigation (Add Risk Item using View All)

1. From the **Bid Details** tab, choose the **View All** button in the Captured Risk list on the right side of the screen.
 - The final way you can add a risk item by choosing the "View All" button on the right side of the screen inside the Capture Risk list. You'll notice that the captured risks list shows all of the risks that have been identified. From here, you can opt to add additional risk as you review identified risks.



Add Risks Activity

1. Split learners up into groups of 2-3.
2. Direct participants to XXX Bid
3. Learners will add a risk item using the "Add Risk Item +" button, the View All button, and via a Guidance question as it pops up.



Navigate the classroom and provide support as needed.



Change screen to show PowerPoint



Click for next slide

Part 5: Competitive Intelligence



Total Slides:
2



Total Duration:
5 minutes



IQ Demo:
Competitive
Intelligence



Slide 17



1 minute



Let's transition to the next phase of your bid: Understanding where your bid stands with others. As you can see, we're still at the Bid Analysis phase in our bid process.



Click for animation



Right now, there are no formal tools used to keep track of competitor's bids outside of Excel spreadsheets. However, this information is essential to not only informing the bid you're working on, but also future bids. While this is a new request in our process, the data gathered from this is essential to our current and future success. Let's see how these forms are filled out.

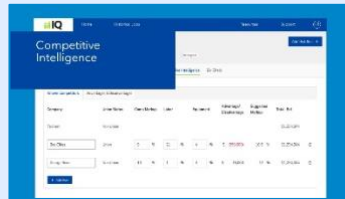


Click for next slide

SLIDE 18



Slide 18



10 minutes



Change screen to InQuarry

**InQuarry Navigation (Competitive Intelligence)**

1. Choose **Competitive Intelligence** tab
 - As we anticipate other competitors for our bid, we can fill out this section based on our knowledge of their typical markup from previous jobs. This gives Estimators the opportunity to create a competitive bid. As you can see, there are only a few fields that are needed: The competing company name, the markup, labor, and equipment percentage.
2. Choose a company name using the type-ahead function and type in fictitious data to show how the form is completed.
 - If you add a new company, it will be tracked here, but the data entered is not shared back to Cosential.
 - Please note: if a competitor does not appear in the type-ahead list, the Estimator will need to add the competitor in Cosential.
3. Choose **Advantages & Disadvantage** tab
 - The Advantages & Disadvantages tab allows you to list specific advantages or disadvantages your bid has versus one or more of the competitors; this is same task that you previously did in a spreadsheet. For each row you select, Advantage or Disadvantage, describe it and assign an estimated potential value.
 - The competitors that you have listed on the Known Competitors screen will show up here on the right and you can check the boxes according to which competitors you would have that particular advantage or disadvantage against. Then the advantages/disadvantages for each competitor are summed up and appear in the Known Competitors screen.

Although this is a new location to record competitor data, Chief Estimators will be looking here for this analysis during the bid review going forward so let's get some practice in.



Competitive Intelligence Activity

1. Direct participants to XXX Bid
2. Ask participants to add one known competitor and values based on a current or previous job.



Facilitator Note: The data does not necessarily need to be accurate, the participants just need to become comfortable using the type-ahead function and adding values in the necessary fields.

3. Ask participants to add one advantage and one disadvantage on the Advantages and Disadvantages tab based on knowledge from a current or previous job.



The data does not necessarily need to be accurate, the participants just need to become comfortable using the tab.



Change screen to show PowerPoint



Click for next slide

Part 6: Spot Check



Total Slides:
2



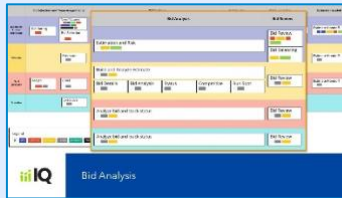
Total Duration:
5 minutes



iIQ Demo:
Spot Check



Slide 19



1 minute



So, we're done with creating our bid, right? Are you sure? Did you forget anything?



There are so many essential tasks needed to create a successful bid, that one task can easily slip through the cracks. The good news is that we have a way to double check your bid progress: the Spot Check. This Spot Check reviews key aspects of your bid, but not every part. For more information about what the Spot Check reviews, see the User Guide. We'll cover some of this today.



Click for animation



Although technically you can see that it falls at the end of the Bid before your Bid Review, you don't need to wait. You can, and it is highly recommended, to run this Spot Check regularly throughout creating the bid, and not just wait until before your Bid Review.

For detailed information on how the Spot Check works, reference the User Guide that explains how InQuarry uses analytics to perform this function.

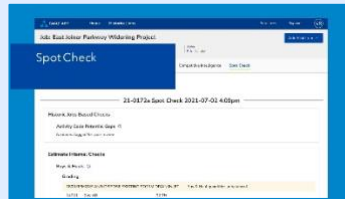


Click for next slide

SLIDE 20



Slide 20



15 minutes



So, what does this Spot Check...check? Running the Spot check checks your bid against business rules against what has been built in the estimate in HeavyBid & InQuarry and will look for the following:

- *Activity Code Potential Gaps: Uses the data analysis of historical jobs to look for patterns of activity codes to determine if there are specific codes that are not present in this bid and may want to be included.*
- *Buys Without Hauls: Looks specifically for Activity Codes that are "buys" (e.g., buy asphalt without putting a haul action to take it to the job site) and determines if there are matching haul activity codes in matching total quantities.*
- *Activity Codes with No Cost: Checks for activity codes where the cost is \$1 or less.*
- *No Safety Risks Entered: Checks to see whether any safety risks have been entered into InQuarry.*



Change screen to InQuarry



InQuarry Navigation (Spot Check)

1. From your **Assigned Bids** page, select **XXX (TBD)** Bid
2. Choose **Spot Check** tab
3. Choose the **Run Spot Check** button to run the report on all 4 checks
4. Choose **Activity Codes with No Cost** option
 - When you make updates to the bid (HeavyBid), you will need to choose the "Run Spot Check" button again to refresh your screen. Each spot check ran will result in a timestamp for reference.



Change screen to show PowerPoint



Click for next slide

Part 7: Bid Review



Total Slides:
2



Total Duration:
21 minutes



IQ Demo:
Bid Review



Slide 21



1 minute



Ok, so you've run your Spot Check again and you feel that your bid is ready for a formal review by your Chief Estimator.

What next? Well, InQuarry makes this discussion much easier. Before we jump into the app, where are we at in our bid process? We've finally moved from the Bid Analysis portion and into our formal Bid Review.



Click for animation



As you can see, historically we've used multiple tools during our bid review with the Chief Estimator. IQ can streamline this review. Going forward, you can use IQ to drive your Bid Review discussions.

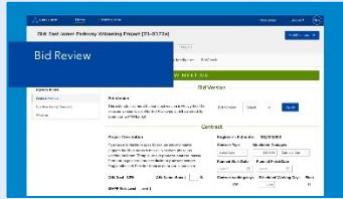


Click for next slide

SLIDE 22



Slide 22



20 minutes



So, what does this Bid Review look like in InQuarry and how do we use it to lead our bid reviews with Chiefs? Let's explore together on this one.



Change screen to InQuarry



InQuarry Navigation (Bid Review)

1. Choose **XXX Bid**
2. Choose **Milestones & Report** tab
3. Choose **Bid Review** template
 - As you can see, this template outlines items that are complete and incomplete. This template will now be what is used during the working session between Estimator and Chief Estimator for the Bid Review. So, what does that mean for Estimators? Make sure to look through this and resolve issues/incompletes before scheduling your Bid Review with your Chief.
 - When functioning, instead of prompting to find specific XXX answers that are incomplete, prompt to find incomplete answers and answers them.
 - You'll notice that there are three screens that provide you an additional information on your area of focus which are Costs & Markup, Question Prompt Answers, and Wrap-Up.
4. Choose **Costs & Markup**
 - Estimator will use this screen to complete the cost and markup tasks. This is a cost analysis at the bid level (remember, the cost analysis in the Bid Details tab shows costs at the activity code level). It is here that you and your Chief will determine the markup.
5. Choose **Question Prompt Answers**
6. Choose the carrot next to a work type to see answers to the guidance questions in that work type.

- Chiefs and Estimators will use this screen to discuss the answers to the questions that were prompted in the Bid Details tab. Answers can be edited until wrap-up is completed.
 - Indicators will allow you to quickly see if the questions have been answered, ignored, or only partially addressed.
7. Choose the last menu carrot for Risks
- Here you will see the list of captured risks. By selecting the carrot, you can see additional details. You can also filter by safety. This will provide you a list that is the starting point for your JHA. No additional steps needed! It will show up in the Estimator handoff workflow. As you can see, this list is more robust details than the current JHA process.
8. Choose **Wrap-Up**
- Together, you can review the complexity per work type. From here, review best practices. Additionally, you or the Chief can add comments about the bid review. These comments will be displayed during the PM handoff.
 - When you are finished, you can choose the "Bid Review Complete" button. This changes the status bid from review to bid complete. InQuarry identifies that this bid is to be submitted to owner/agency and the bid can no longer be edited.



Bid Review Activity

1. As a class, review XXX Bid.
2. **Ask:** If I were an Estimator and you were my Chief Estimator, am I ready for my Bid Review?
3. **Answer:** No, XXX and XXX are still showing as incomplete in Question Prompt Answers.
4. **Ask:** How can I resolve these? Where do I look/click?
5. TBD depending on items left incomplete in sample XXX bid.



The data does not necessarily need to be accurate, the participants just need to become comfortable using the tab.



Change screen to show PowerPoint



Click for next slide

Part 8: Wrap Up



Total Slides:
1



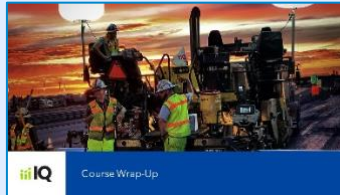
Total Duration:
5 minutes



IQ Demo:
N/A



Slide 23



5 minutes



Remember, how we prepare and manage a bid/project have changed – we now have a new tool to help your bid and subsequent job have be more informed as we focus on Operational Excellence, Data Mindset, and Unleashing our Talent (3 Pillars).

We can only be as successful as a team.



This 1.0 release is only the beginning. That additional releases of the web application are scheduled that will expand the functionalities and features, plus allow other roles to use the web application. That means there can be a lot of questions and needs as we use IQ.



So what resources are available to you?

Possible Answers:

- User Guide (Training section of the Augusta Content Hub in SharePoint for this web-based application.)
- Bid Folder Protocol document (Training section of the Augusta Content Hub)
- Ask Augusta email



Ask for any last-minute questions.

Thank the participants for being part of the training and conclude class.

END OF SESSION

Appendices

APPENDICES

This section contains resources for the Facilitator.

Appendix A: Glossary of terms

Appendix B: Session Evaluation

APPENDIX A: GLOSSARY

03 record — “03” status is a Cosential status assigned to a bid when it is ready for an Estimator to begin building.

Activity Code — Line item assignment.

AGTEK — SW used by Estimators for takeoff. Can overlay output on Google Earth.

AM — Area Manager

APCO — Approved Plan Change Order

Bid — A project that is being built (“estimated”) that has not yet been awarded.

Building Connected — Purpose is to send a broadcast message out to Subcontractors and Suppliers to tell them about the project and what will be needed for each portion of the project. Uses buildingconnected.com website.

CAT — Cost Allocation Tracking

CCA — Construction Cost Analysis: A monthly report in Vista that a Project Manager can run to update project status. The report is generated as a pdf viewable for stakeholders to review.

CO — Change order

CR — Change request

Cosential — ██████'s CRM. This is used to assign status to a potential bid.

Cost Codes — Used for tracking, managing, reporting on the amounts, quantities, budgets, profit and other account information associated with the job.

Craft Employees — Trade / Union employees

Cure — Spray on concrete to help the drying/curing process.

DBE — Disadvantage Business Enterprise: Public entities require a certain percentage of work be performed by DBE's.

Escalation —The increase in labor, equipment, materials, subcontractor, and trucking costs that occurs over time. (Impacts multi-year projects or projects that span typical annual cost increase dates.)

Estimating — Used interchangeably with Procurement.

Estimator — role tasked with building a bid during procurement.

EVA — Estimated Versus Actual

Feed the Beast — making bids and winning projects to fill their capacity of crews and equipment that enhances profitability. Optimizing the supply of resources with the project capacity to use them.

Foremen — The highest union or craft personnel.

GreenSheet — A common term for a bid that is founded on “safe” unit prices without the process of preparing a fully researched and analyzed bid.

HCSS — SW Vendor. [REDACTED] uses: HCSS Safety, HeavyBid and HeavyJob. Trialing HCSS Trucking.

HeavyBid — Bidding software.

HeavyJob — Field management software.

InQuarry App — Internal use term for the technology application being developed within Project Augusta.

JHA — Job Hazard Analysis

KMZ file — An output of Takeoff from PlanSwift can be used with Google Earth to provide land details for an Estimator.

Major Pursuit — All projects >\$15M will be considered a major pursuit.

Mega Pursuit — All projects >\$150

Market Code — A HeavyBid code that denotes a particular market in California (Stockton, Bay area, etc.).

Market Genie — SW used to enter/track competitive info. Being replaced with Cosential.

NEO — New Employee Orientation

PCO — Pending change order: Fade or recovery.

PE — Project Engineer

Phase code — Same as Cost Code. [REDACTED] specific. xxxxx.1.2.3 Dot 1 refers to item in contract.

PlanSwift — ‘Takeoff’ software to generate quantities of materials based on set of plans.

PM — Project Manager: [REDACTED] role tasked with Project planning (post estimate handoff) and project execution stages

PPE — Project Planning & Execution; also, Personal Protective Equipment.

Procurement — Used interchangeably with Estimating.

Project Augusta — The title of the entire project that has been socialized with [REDACTED] company-wide.

PSWS — Project Status Worksheets

QSP — Qualified SWPPP Practitioner: A vendor that develops the Stormwater Pollution Prevention Plan.

RM — Regional Manager that oversees PMs.

SDS — Safety Data Sheet

SI — Superintendent: A Field Manager that manages multiple foremen.

SWPPP (aka “Sweepie”) — Stormwater Pollution Prevention Plan

Take-off — detailed units and costs of a job estimate that includes count and costs.

[REDACTED] **App** — Non-authenticated app with mostly safety and Covid info (documents) available on mobile devices.

[REDACTED] **University** — learning portal that contains training opportunities and materials.

TEU — [REDACTED] Energy & Utilities

Tnet — [REDACTED] Internal: SharePoint repository.

Vista — software that tracks data on costs and spend on projects.

USA — Software that tracks data on costs and spend on projects

WAO — Work Area Observation

APPENDIX B: SESSION EVALUATION

Provide the following page to participants that attend the session. Collected feedback may be shared with senior leadership and to plan for future sessions.

Thank you for attending this session on InQuarry. We would appreciate your feedback.

EVALUATION CRITERIA	NOT AT ALL SATISFIED	NOT SATISFIED	NEUTRAL	SATISFIED	VERY SATISFIED
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SESSION CONTENT: How satisfied were you with...					
Session met my needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content was relevant and added value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments:					

TRAINING METHODS: How satisfied were you with the training methods?					
Explanation of Benefits of IQ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demo of IQ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments:					

What part of this session was most beneficial to you?

What part of this session was least beneficial to you?

Overall, you found this training to be...			
Not at all Useful <input type="checkbox"/>	Not useful <input type="checkbox"/>	Useful <input type="checkbox"/>	Very useful <input type="checkbox"/>

On a scale of 1-10, how likely are you to recommend this training to a colleague? (1 = not at all likely 10 = extremely likely)									
1	2	3	4	5	6	7	8	9	10