## Approved By:

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| --- | --- | --- | --- | --- |
| Refer evidence at link –  <https://ge.ent.box.com/folder/33748400223> |  |  |  |  |
| Muthu Palaniappan  ITO Commercial Leader – SPS & Services |  | Tim Sims  ANZ QMS Lead |  |  |

**Document Revision Chart**

The following chart lists the revisions made to this document tracked by version. Use this to describe the changes and additions each time this document is re-published. The description should include as many details of the changes as possible

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| --- | --- | --- | --- |
| **#.#** | **Section Modified and Revision Description** | **Date** | **Author** |
| 1.0 | First Issue | 1.11.2012 | Anna Lestuzzi |
| 2.0 | Inclusion of PO review and acceptance step | 17.01.2013 | Anna Lestuzzi |
| 3.0 | Inclusion of inter-regional “overflow” process flow | 12.08.2013 | Anna Lestuzzi |
| 4.0 | Bid due date confirmation removed, “R” process informantion removed,aligned with global Inquiry to order procedure OGQ-0111 | 12.07.2014 | Tenille Vestey |
| 4.1 | Review of Document list for Project Handover to Services added | 22.09.2015 | Sagar Zende |
| 4.2 | Review of the document to update it with Deal machine | 19.09.2016 | Criseida Osorio |
| 4.3 | Rebranded to BHGE inclusive of references within body of document. Overall content simplified. | 28.07.2016 | Criseida Osorio |

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# Purpose

# Inquiry-to-Order (ITO) is a process for developing commercial opportunities and obtaining orders at Baker Hughes, a GE Company (BHGE).

# The ITO process defines how the Service businesses receive requests for pricing, generate quotes/proposals, issue these commercial offers and formally accept orders.

# Scope / Application

# This work instruction is applicable for opportunities identified for Subsea Services and Oilfield Equipment (SS&OE) in the BHGE ANZ Region.

# This work instruction is applicable for Product Management Service including but not limited to:

# Field Service Engineering (FSE),

# Rental,

# Repairs,

# Solutions,

# Integrated Services (IS),

# Spares,

# Equipment Management (EM),

# Training,

# 

# Procedure

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| # | **INPUT** | **PROCESS ACTION** | **RESPONSIBILITY** | **OUTPUT** |
| 3.1 | Business Opportunity Identified | * **For Quotations:** * Internal customer (ISL or Sales) receive request for pricing from external customers and submits completed RFQ form (QF-PER-044) to ITO commercial resource. * Prior to submitting an RFQ, ISL may engage various teams to develop RFQ scope of work for requests which involve repairs, solutions, training, and offshore products, * **For CTRs** * For Cost Time resource (CTR) opportunities, form QF-PER-064 can be used for contract call-off requests.   **For Variation Orders**   * OTR submit Variation Order Forms (QF-PER-048). ITO to treat variations as RFQs. | Sales Or ISL | Opportunity submitted |
| 3.2 | RFQ approval | * Review RFQ form, ensure all relevant fields are complete with sufficient detail and scope. * RFQs with insufficient detail are sent back to requestor with reason for rejection. * Pursue / Not to pursue decision is made based on commercial and technical acceptability. | Proposal specialist | Proposal Processing |
| 3.2.1 | Opportunity Logged in DM | * If RFQ is accepted, create Deal Machine record with opportunity data. * Acknowledge receipt of RFQ to internal customer. * ITO Checklist (QF-PER-045) can be used as a hardcopy tool to keep track of quote progress. * Initiate deal management module in Deal Machine for risk assessment. | Proposal Specialist |

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| # | **INPUT** | **PROCESS ACTION** | **RESPONSIBILITY** | **OUTPUT** |
| 3.3 | Opportunity Logged in DM | * Create folder location in the [Australia Services Information Repository](http://supportcentral.ge.com/dataforms/sup_dataform_viewall.asp?prod_id=203839&form_id=316914&xsl=geTemplate) ensuring functional team members are granted access. * For Variation Orders the existing project electronic folder location can be used. | Proposal Specialist | Proposal Processing |
| 3.4 | Proposal Processing | Proposal Fulfillment   * Consult with operations and functional support teams to coordinate proposal offering. Information gathered will include but will not be limited to the following:  Field Service Engineering (FSE), - availability, expertise, permits.Rental – availability, qty, source location, spares, third partyRepairs – resourcing, third party, test fixturesSolutions – engineering CTRIntegrated Services (IS) – durationSpares – p/ns, specifications, vendors, inventoryEquipment Management (EM) – preservation, storage needsTraining – delivery location, course development, technical scope. – Request additional support where required:   1. Services or parts which require outsourcing should be requested through the [Sourcing RFQ workflow](http://supportcentral.ge.com/products/sup_products.asp?prod_id=291889http://supportcentral.ge.com/products/sup_products.asp?prod_id=291889) 2. Submit intercompany RFQ (where required) 3. Engage Application Engineer to coordinate technical input from relevant business teams (e.g. requestor, Quality, Engineering, Workshop) and complete Technical Regulatory Standards checks where required. 4. ITO to conduct Bid Kick off meeting with relevant stakeholders as required. | Proposal Specialist | Proposal Fulfillment |
| # | **INPUT** | **PROCESS ACTION** | **RESPONSIBILITY** | **OUTPUT** |
| 3.5 | Proposal Processing | * Ensure Quality requirements are met in proposal based on:  1. Customer requested requirement if specified in ITT/RFQ, e.g. customer specification, 2. For existing products, review contract and project specific requirements to ensure same standards are met. 3. Any other requirements specified in RFQ form 4. Documentation requirement ( e.g. COC, ITP, MPP) 5. Inspection Records requirements 6. Hold Points requirement. | Quality | Quality Requirement reviewed |
| 3.6 | Proposal Processing | Risk Review:   * Obtain and document approvals based on DoA. ITO to complete deal path on Deal Machine (Express or Deal Desk). * For proposals presented under existing frame agreements confirm that all contractual requirements are met. | Proposal Specialist | Proposal provided to customer |
| 3.7 | * Finalise commercial proposal and cost model. Obtain approvals per DOA. * For complex deals and service agreements, approval is supported by business review meetings or sign-off. * Send final proposal to requestor. * Update Deal Machine. |

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| **#** | **INPUT** | * **PROCESS ACTION** | **RESPONSIBILITY** | **OUTPUT** |
| 3.8 | Proposal Documentation | * Throughout the proposal development maintain record of proposal documentation in [electronic folder location](http://supportcentral.ge.com/dataforms/sup_dataform_viewall.asp?prod_id=203839&form_id=316914&xsl=geTemplate). e.g: * Cost models * proposal documents (including any revisions) * RFQ, Variation Order Forms (QF-PER-048) and commercial & technical clarifications * vendor quotes and clarifications * agreed personnel resourcing and scope of work * Any other supporting documentation related to project execution * Internal approvals | Proposal Specialist | Proposal Tracability |
| 3.9 | Customer response on Proposal Received | Customer PO received Review PO and confirm acceptability against proposal.   * In case of discrepancy obtain clarification & correction from customer. * If PO is acceptable, obtain approval as required through DoA guidelines and ensure Service Contracts are duly executed. send acceptance of PO to Customer. | Proposal Specialist | Proposal Accepted/ Rejected by Customer  PO reviewed |

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| **#** | **INPUT** | **PROCESS ACTION** | **RESPONSIBILITY** | **OUTPUT** |
| 3.10 | Customer response on Proposal Received | Customer Order not secured   * If order not secured from Customer, process order as “Closed Lost” in Deal Machine with reasons. |  | Deal Machine updated |
| 3.11 | Handover Approved | Update the Deal Machine opportunity with the relevant order information and depending on the order booking criteria disposition the status as “Closed Won” | Proposal Specialist | Deal Machine updated |
| 3.12 | Handover Information Compiled | * Store Executed Contracts in [Global CCD system](http://ccd.vetco.com/loginconfirm.htm)  1. Upload in Electronic Folder location the awarded proposal; customer PO; and any other relevant documentation,correspondence and approvals. | Proposal Specialist | Documentation recorded |
| 3.13 | Electronic documents ready | * Log Order in [OTR Tracker](http://supportcentral.ge.com/dataforms/sup_dataform_viewall.asp?prod_id=203839&form_id=316914&xsl=geTemplate). Notification sent to OTR and requestor to finalise handover. * For Large & Complex Orders arrange formal ITO-OTR meeting with Business teams. | Proposal Specialist | Handover to OTR Completed |

# Responsibilities

As per Responsibility column of Section 3.0.

# Quality Records

The following records produced by this WI are considered Quality Records and shall be maintained and controlled according to the requirements in OGQ-0102 - Record Control where applicable:

QF-PER-044 Request for Quatation(RFQ ) Form-CommOps

QF-PER-045 Pricing and Quote Check List (ITO) - CommOps

QF-PER-064 Cost-Time-Resource Document

QF-PER-048 Variation Order Form

# Terms, Definitions and Acronyms

Refer to [GE O&G QMS Lexicon](http://supportcentral.ge.com/@lexicon) for Terms, Definitions and Acronyms. Acronyms have been repeated here for convenience purposes

# Terms

| **Term** | **Definition** |
| --- | --- |
| Deal Machine | BHGE primary Customer Relationship Management tool (CRM). Deal Machine is an interactive database used to track and measure commercial opportunities and flow business. Deal Machine is interfaced off the Salesforce.com engine. |
| Deal Management | This is a module within each Deal Machine opportunity entry which must be complete prior to issuing a Proposal to the customer. Deal Management is a risk assessment tool, which determines what level of review and sign-off is required for each Proposal. |
| Oracle | Australia O&G Oracle Enterprise Resource system |
| PMS Code | Formal Services financial codes allocated to costs and revenue for financial management and reporting purposes. |
| Risk review | The GE Risk Management frame work that defines the key phases of Opportunity pursuit. Risk review promotes the complete review of risk versus reward through cross-functional collaboration. |

# Acronyms

| **Acronym** | **Definition** | **Acronym** | **Definition** |
| --- | --- | --- | --- |
| BHGE | Baker Hughes, a GE Company | SS & OE | Subsea Services & Oilfield Equipment |
| SS | Subsea Services | CommOps | Commercial Operations |
| SFDC | Sales Force dot com | ITT | Inquiry to Tender |
| DoA | Delegation of Authority | RFQ | Request For Quotation |
| EM | Equipment Management | CRM | Customer Releationship Management (Deal Machine) |
| ERP | Enterprise Resource Planning | PMS | Product Management Services |
| IS / ISL | Integrated Services / IS Leader | PO | Purchase Order |
| COC | Certificate of Conformance | ITP/MPP | Inspection test Plan /  Manufacturing Process Plan |

# References

[GE O&G QMS Lexicon](http://supportcentral.ge.com/@lexicon)

[OGQ-0102 – Record Control](http://library.ps.ge.com/quality/home/components/drl/drl.jsp?objectId=0900f5ea804c7d93&showRendition=true)

[OGQ-0111 - Inquiry to Order](http://edms.pw.ge.com/dctmquality/home/components/drl/drl.jsp?objectId=0900f5ea8056e0e2&showRendition=true)

QF-PER-045 – Pricing and Quote Check List (ITO) - CommOps

QF-PER-064 – Cost Time Resource Form

QF-PER-072 - SS Project Handover Checklist Jandakot

QW-FAC-PER-019 – Order to Remittance (OTR) Process WI

[ITO-GLOBAL-E-WI-001](http://library.ps.ge.com/quality/home/components/drl/drl.jsp?objectId=0900f5ea802a76c9&showRendition=true) ITO Proposals Process Tollgate Work Instructions

[Global Services ITO Site](http://library.ps.ge.com/quality/component/main?__dmfCustomerId=1345909307399&__dmfTzoff=-480)

[GE Onboarding Policy](http://integrity.ge.com/wp-content/uploads/2012/11/GE-Onboarding-Due-Diligence-Policy.pdf?lang=en&country=US)

Segregation of Duties- <http://data.supportcentral.ge.com/upload/18616/doc_3056848.doc>

Sourcing RFQ Workflow Support Central Link: <http://supportcentral.ge.com/products/sup_products.asp?prod_id=291889>

# Compliance Requirements

Full compliance required after publishing in the QMS (Documentum).

|  | BHGE |
| --- | --- |
| Title: | Services Inquiry-to-Order (ITO) |
| Reference: | QW-FAC-PER-018 |
| Revision: | 4.3 |
| Application Date: | 28.07.2017 |
| Expiration Date: | 27.07.2020 |
| Author: | Criseida Osorio |
|  |  |

# Appendix: Indicative Flow Chart

* 1. **ITO Process**

