

RFP Checklist

Prepared by





RFP Checklist

General Information

- Overview of your organization
- Overview of project—what are you hoping to accomplish?
- Current environment
 - High level list of existing solution components
 - Pain points with existing solution
- New solution expectations
 - How will it be different from the current environment?
 - Will all components of the existing environment also be required in the new solution?
- Project schedule
 - Date issued
 - Bidder's conference date (optional)
 - Last day for questions
 - Proposal due date
 - Vendor presentations date
 - Target date for final selection
 - Contract negotiation period
 - Begin implementation
 - Go live

Proposal Information

- Proposal format
 - Explain how you want them to submit the proposal; is there a specific table of contents that you want them to follow? (Hint: a standard format makes it easier to compare proposals)
 - Do you want proposals in a specific format (such as Word) or is PDF acceptable? Note that with PDF it is difficult to cut and paste, and may make your comparison process more difficult.
 - Pricing:
 - Do you want itemized pricing (a list of every component and its price)?
 - Do you want a pricing summary (total price for the solution)?
 - How should pricing for ongoing services and/or support be provided?
 - Do you want to be able to compare pricing from multiple proposals? If so, you may want to specify that pricing be submitted in Excel format instead of PDF to make cutting pasting into a comparison document easier.
 - How long must the pricing be valid?
- Proposal Delivery
 - Date, time, and location proposals are due
 - Format of proposals (electronic, print, number of copies)
 - Address for submittal (physical address, email, etc.)
- Selection Criteria

Legal Stuff

- Terms and Conditions
 - Your organization's standard language
- Payment Schedule
 - Be sure to withhold at least 25% of the upfront charges until the system has been accepted
 - Do not make any payments for monthly services until you are up and working on the new solution

Vendor Information

- General info
 - Name of company
 - Company representative and contact information
 - References
 - Qualifications
 - Size
 - Longevity in marketplace
 - Longevity and experience with proposed solution
- Specific Requirements
 - Specific features or capabilities that must be provided
 - Questions about Service and support capabilities
 - Other

Requirements for the New Solution

- High level requirements and overview of desired solution, including the components required in the new solution
- Call out important capabilities
- Explain current pain points and ask for specific solutions for these issues
- List the components required in the new solution
- Provide counts for
 - Users, by type (if applicable)
 - Describe each user type and the requirements for each
 - Licenses, by type (if applicable)
 - Describe each license type and the requirements for each
- List all required integrations, existing or new
- List all security and compliance requirements

Implementation Requirements

- Require an overview of the implementation process and a sample project plan
 - Structure of the implementation team?
 - What tools will they use (collaboration tools, document storage, etc.)?
- What parts of the process are the customer's responsibility?
- What is the change control process?
- Define your training requirements (for users and for the admin team)
 - Training format (on-site, train-the-trainer, web-based, etc.)
 - How many people will be trained?
 - What training documentation is required?
- Day 1 support requirements
- Acceptance criteria
- Transition to ongoing support team

Ongoing Support

- Definition of major and minor outages
- Response times expected for each tier
- Penalties for non-performance
- Customer responsibilities vs vendor responsibilities
- Customer portal or tools for submitting change requests and troubles
- Customer tools for administration of solution
- What levels of support are provided when third party solutions are integrated and there are performance problems?
- Are there any components of the solution that they do not support?
- How much depth does the bidder have across all facets of solution?

What can Swartz Consulting do for you?

Provide independent advice from experts who are not trying to sell you any products. We focus on helping you find the right solution for your unique situation.

Help you avoid pitfalls in the complex world of business communications technology.

How do we do this? We work with many different clients, on a wide variety of projects. We bring this experience to your project and guide you past the rough spots. We offer proven processes, documents, templates, AND the ability to creatively adapt them to fit your unique needs.

We offer multiple options:

 Do It Yourself

 Remote Consulting

 Onsite

 Custom Consulting

Contact us: 913-894-0159 / info@swartzconsulting.com / www.swartzconsulting.com