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RFP

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Introduction

Welcome

So you're working on an RFP. Maybe you've spent months planning for this, working on funding, assembling the team, etc. And so now, when it's time to get started, you might be tempted to throw the kitchen-sink into the RFP. After all, you might think, you want a firm that can give you the most value -- and, in this case, value is measured in how many features the vendor can cram into as small a budget as possible.

But this would be a mistake. And the goal of this whitepaper is to help you avoid common mistakes that can compromise your outcome.

I've worked as a consultant for nearly 15 years. At Bluespark, combined, the leadership team has over 85 years of experience. Not one of us has seen a Request for Proposal that we found useful or that, by the end of the project, matched the company's actual need. We want to see better RFPs. This is not only because we don't want to read bad ones, but because we want to help you achieve your goals.

The RFP is your VIP (Very Important Project) document

The RFP is the first deliverable of the project. In many ways, it's the document that will determine the success or failure of the project. It's your framework for selecting a vendor AND it's the document that will determine whether an agency wants to work with you. Selecting the right vendor (and having the right vendors to choose from) will get you more than halfway to a successful project.

Another key point: The RFP will be referred to at the end of the project to determine whether the project was successful. Does our deliverable meet all the goals and requirements outlined in the RFP? If it does not, we've failed or at least fallen short.

Following the guidelines I've outlined here should make your life easier -- and the life of your potential vendors easier, too.

For whom is this white paper intended?

If there's one thing I know about you, potential client, it's that you need a vendor for a project. Beyond that, my crystal ball gets hazy.

Maybe you work for a small company and just want to be sure you're conveying all the needed information about the project to your potential vendors.

Perhaps you work for a large corporation or university where your RFP templates are strictly defined.

Or maybe it's somewhere in the middle. Some processes in place, but no rigid guidelines for what an RFP should look like.

Regardless of your situation, I hope that with this paper, you'll find ways to explain your needs in a clearer and more helpful manner, which will ultimately benefit you and your project.

How to use this white paper

This whitepaper offers a framework for a new kind of RFP. One that:

- saves you time and money.
- helps you start the project faster and select the best vendor for the job.

There are many different types of projects. I address full scale website design and development projects in this white paper. That's what we do at Bluespark, so it's the type of RFP we most often encounter. It's possible these principles can apply to other types of projects, but we can't guarantee that.

So use what you can. The ideas come from a team that has read hundreds of RFPs. After you've reviewed this paper, we'd love to get your feedback on the ways it was helpful (or not) for you.

What is an RFP?

Here's what Wikipedia says:

The RFP presents preliminary requirements for the commodity or service, and may dictate to varying degrees the exact structure and format of the supplier's response. Effective RFPs typically reflect the strategy and short/long-term business objectives, providing detailed insight upon which suppliers will be able to offer a matching

perspective.

Ugh. So stilted, and yet it very accurately defines what many people see as being the purpose of a *Request for Proposal*.

Let's break this down and discuss the problems with this view on an RFP.

The first problem is a big one. This definition presumes that you know exactly what you need. Perhaps this works for large corporations (though not as often as you might think). In many cases, clients I've worked with understand they have a problem, but are not sure what that problem is. Or, worse yet, they focus on a symptom of the problem rather than address the underlying issue.

If you invest days, weeks, or even months writing an RFP to solve the wrong problem, it becomes very difficult to help you meet your goals during the actual project. This time investment also creates a commitment to the defined problems and solutions -- even if, after further exploration, you discover that you are on the track. Due to the *Sunk Cost Fallacy*, it can be difficult to let go of requirements that you have spent so much time refining.

Wikipedia's definition also downplays the expertise that your chosen vendor brings to the table. If you are looking for a hammer, you go buy a hammer. But if you're looking for a website that helps you further specific goals of your business, do you hire someone that can build you a website? Or hire someone that knows how the Internet works, understands the world of possibilities online, and how to apply the available technologies to meet business and user needs? If you are hiring the latter, why are you tying their hands with a laundry list of cast-in-stone requirements?

Finally, the definition fails because it presumes that this information can be conveyed just through documentation. Documentation is an artifact of conversations.

And RFPs are the worst kind of artifact. At best, an RFP is the artifact of a conversation between the RFP creator and a business stakeholder, reflecting their understanding of the business need, technological constraints, organizational politics, and an understanding of how to deal with these issues.

At worst, an RFP is the artifact of various committee decisions with multiple authors who

are potentially at cross-purposes.

And, there's one key point missing from this definition: RFPs are used to evaluate the success of the project. I've worked on many projects where the client's project team would, at the end of the project, go through item-by-item on the RFP to determine whether we had delivered the specific functionality as they had defined. Nevermind that we spent weeks or months identifying with the client specific needs and designing for those needs; if it didn't map to the need as defined in a committee several months before we even started the project, the feature was rejected. Crazy.

All these points suggest we need to rethink the RFP process and document.

We need something that more accurately reflects the challenges you are facing in your business and that allows you to more quickly and confidently make a vendor selection.

Rethinking the RFP

So, how do we rethink the RFP so you can be more effective in communicating your needs and evaluating vendors?

Let's start with the goals for your RFP.

The RFP is the start of a conversation.	This is the most important aspect to the RFP. It's the fundamental idea that an RFP is not set in stone, that the ideas conveyed therein will evolve as the project evolves, and that other documentation will come to supercede the RFP. It also makes room for the expertise of your chosen vendor to influence the project outcome.
The RFP communicates a goal, problem, and scope	Once we realize that the RFP is the start of a conversation, we need to look at what needs to be communicated. Above all else, you need to communicate the goal of the project and the problem the project is attempting to solve. These two things frame the conversation you're having with potential vendors and help to determine scope.

<p>The RFP does not define a solution</p>	<p>In communicating the goal, problem, and scope of the project, the RFP does not try to divine the solution. An RFP should not list a series of specifications for implementation. If you need a photo gallery to achieve a particular goal, great! But allowing users to bookmark particular photos in that gallery is a specification that can be defined as part of the design phase.</p>
<p>The RFP frames the project</p>	<p>The RFP frames the project by outlining the scope of the project. During the selection process, the RFP helps you identify the right vendor for your project, but once the project starts, the RFP becomes the key document for kickstarting your project. A good RFP sets the project off in the right direction. A bad one can send your chosen vendor off in the wrong direction. You may end up with a project that meets all or most of what you outlined in the RFP, but does not actually meet your business goals.</p>
<p>The RFP gives you a framework for evaluating and selecting a vendor</p>	<p>The RFP is the most important document in the entire project (no pressure) as it is the framework around which you choose your vendor. It's also the document potential vendors will use to evaluate the project and determine whether they want to work with you. Write a poor RFP and you're likely to select the wrong vendor.</p>

This last point is a critical one, so I want to restate it with one extra point:

Write a bad RFP and you'll select the wrong vendor. And build the wrong product.

The RFP Process

Make no mistake about it, the Request for Proposal process is involved and can take several months to complete -- even for smaller projects -- especially when multiple departments are involved.

Here are the typical steps you might go through in the vendor selection process:

Write your RFP	This is the actual work of writing your Request for Proposal. Your timeframe for writing the RFP will vary greatly depending on the complexity of the project, the number of stakeholders involved, other project priorities, and your company's approval process.
RFP Issued	This is the date you make your Request for Proposal publicly available. I strongly recommend that if you have vendors in mind for the project, you've contacted them before the release. At the very least, let them know that the RFP is coming. This should give them time to allocate internal resources for responding to the RFP.
Q&A	Assuming that you have a formal Q&A process (and I suggest you do), make the deadline 10-14 days after the RFP is issued. This gives late-comers to the RFP process a chance to get their questions submitted. Give yourself 3-4 days to answer all the questions. Plan to include the answers to the questions as an addendum to an updated version of the RFP. And then, a day after the responses have been sent, hold a live Q&A session for all your potential vendors. I recommend holding it virtually, but I've seen some vendors hold them in-person.
Deadline for RFP submission	Depending on the size of the RFP, this should be 4-6 weeks after the RFP was issued. Include both the date and the time (and timezone!) of the deadline. Do not accept any late RFPs.
Initial Elimination/ Selection	For most RFP processes, you will need two rounds of review. The first round eliminates any vendors that do not seem to have the experience to address the main needs in the RFP or whose professionalism you question. Eliminate as many vendors as you can in this initial review. It will only save you time later in the process. Email vendors that were cut as soon as you can.

Presentations

Give each of the remaining vendors time to pitch you on their process. If your company has a formal presentation process, you'll obviously want to follow that. Otherwise, I would advise the following: have no formal process. Let each vendor lead their respective meeting. This will tell you a lot about them.

Also consider that the more vendors you allow to present, the more confusing the selection process becomes. Keep the number of vendors that presents to as few as possible. More than five and you might find yourself mixing up the different vendor presentations.

Schedule the presentations for an hour each. Observe how the vendors make use of that hour. Are they all talk? Do they ask questions? Do they push back on your RFP (a good thing!)? Take copious notes. After they leave, everyone should take a short break (for sanity and email) and reconvene to discuss their thoughts on the vendor and the pitch. You don't need to come to a decision right away, but if folks feel strongly yes or no, it should be noted.

<p>Vendor Selection</p>	<p>After the presentations, you should be ready to make your selection. <i>Should</i> be. This isn't always the case. Maybe you like 2 of the 5 who presented and can't decide. You may opt to have the two remaining vendors come back for a final Q&A session with your key stakeholders and give them a chance to address any perceived weaknesses in their pitch.</p> <p>Your goal with this process is to select two vendors. Your preferred choice and a backup. The preferred choice is the one you are going forward with. Your backup is your second choice that you'll use if the contract negotiations don't work out. Tell the backup vendor that they are the backup.</p> <p>Also, a note about courtesy. Please inform any vendor that they didn't make the cut as soon as possible. You should consider calling as many vendors as you can. They spent a lot of time working on their proposal. While it is the cost of doing business, the least you can do is thank them for their effort and give them some feedback on their pitch.</p>
<p>Key Approvals</p>	<p>You're finally down to your top choice. If you haven't already gotten buy-in from the key stakeholders and executive sponsor, you need to do that now -- before you announce to the selected vendor. Once everyone has approved the selection, you can now inform your chosen vendor and move forward with the most fun of any project: contract negotiations.</p>
<p>Contract Negotiations</p>	<p>The devil is in the details. Contract negotiations can sometime take weeks. It can be a painful process with lawyers debating how to handle worst case scenarios with the project, and it's happening at a time when everyone is excited and ready to get started. Make sure you schedule at least 1-2 weeks for this process.</p>

Announce Selection

Once the contract is signed, celebrate! With a project kick-off meeting. If the project is large or high profile enough, a press release may be warranted.

The Content

So we've taken some time to rethink the RFP, and we've talked about the process of issuing one and selecting a vendor. But what should you actually include in your RFP?

There might be dozens of important details and hundreds of minor details that you'll want to communicate in your RFP, but there are only five pieces of critical information that most vendors will care about: resources, budget, time, scope and audience.

Your lawyer might insist on including some legal statements, your company's policy might require you to add information about how awesome your company is. Great. Include all that, but your potential vendors are going to skip right to the meat: resources, budget, time, scope and audience.

There's a simple reason for this: An assessment of these five elements will determine how realistic your expectations are and whether you're a good fit for that vendor.

The five elements defined:

1. *Audience* - The user research and audience profiling used to define the market for your product or service (the more research you have, the more confident your vendor can be that the project will serve user needs).
2. *Scope* - The goals, audience, features, and requirements required to complete a successful project.
3. *Budget* - Includes available budget allocated to the project.
4. *Resources* - Includes personnel (yours, not the vendor's) that will be assigned to the project.
5. *Time* - The timeline for the project.

Audience

Most companies don't have the research to describe either their market or their users. It's unfortunate and something I strongly recommend you find the time to do. This typically

requires two types of research to complete: market research conducted by a marketing firm and user research conducted by a usability specialist. When research like this is conducted -- either as part of a project or as its own stand-alone project -- your ability to market your product and meet the needs of your audience increases exponentially.

If you've conducted either type of research, including the appropriate audience descriptions for each goal should be simple. (You should also mention that the user need is based on research. You should also mention who conducted the research (unless this reveals one of the vendors bidding on the current project) and the methods of inquiry used. And, of course, once the contracts are signed, this research should be made available to your chosen vendor.

If you do not have the research, defining your audience is still important. In fact, perhaps it's even more important. While you might not be able to give an objective definition of your users, we do need to know your working definition of the people that will be buying and using the product or service. These assumptions are critical to understanding the inherent assumptions your organization holds -- as well as surface any conflicting assumptions different departments and executives might hold, cutting through a lot of misunderstandings about why different features are more important than others.

Defining your audience is no easy task. It's not something you can crank out in a couple of hours. It's an on-going process in which you need to get key stakeholder buy-in every step of the way. But the benefits to the RFP process and even the Product Development Lifecycle far outweigh the time required to build these profiles.

So, assuming that you have not conducted any research, let's look at how you go about defining audience profiles.

Audience Profiles

When I walk clients through this process, I like to get them to think about two primary types of roles: buyers and users.

Buyers

Buyers make the purchasing decision. Sometimes this is the same person who will use your product or service, sometimes not. But even if they are the same, they have wildly different needs (and perceived needs) as a Buyer than as a User. Buyers are generally described in terms of market, but also have goals and motivations (user-level) that can also inform

product design.

In many organizations -- families, even -- there are multiple Buyer roles. Some do research and recommend the product. Others review and approve the proposed product. And others have both research and purchasing responsibilities. Think of the role as an authority figure that can determine whether a product or service is used -- even if that product or service is free.

Not all buyers pay with money. If you have a free app in the iOS Appstore, you want your buyers to download it. For a pre-teen, a parent might decide whether a child can use a particular website. For an employee, a boss might decide to try out a 30-day trial on a new platform. In all of these examples, the buyer "bought" the product, but did not pay for it.

It's also important to note that not all organizations have Buyers. A university library, for example, has a locked in audience. Everyone attending the University are automatically locked in to using the Library, thus the Library doesn't have to convince them to use it.

I encourage you to explore your Buyers thoroughly. Here are some questions to ask about your buyers:

1. How invested in this decision are they?
2. Are they doing the research or is the user making a recommendation?
3. Is this a simple expense or will they need approval? Some buyers are allowed to make purchase decisions below a set amount.
4. What are their concerns related to the purchase decision?
5. How do they know they are making the right decision?

Questions to ask about buyers if they are also your users:

1. Why do they want to use your product?
2. Why are they not using your competitors products? Or are they?
3. What are their key factors in making a purchase decision?
4. How long does the purchase decision take?

Consumer market:

1. Are they primarily men or women? What are their ages?

2. How would you describe them? Enthusiasts? Professionals? Amateurs?

Again, we are not looking for perfect answers here. You just want to document your assumptions about these buyers.

Users

These are the folks that will actually use your product. They may or may not have been involved in the purchase decision, but they are now transitioning to actually using the product. There are also many different types of users. Customer service reps have different needs than the sales people. Librarians have different needs than supervisors. If you're helping plan an intranet for your own organization, you have internal users -- employees or contractors.

What we're most interested in understanding about our users are their motivations, goals, and behavior. A user research project (e.g. contextual inquiry or ethnography) could answer these questions definitively.

Here are some questions to ask about your users:

1. Why are they using the system? What is their personal motivation?
2. Where are they using the system? At a desk? At home? Is it a loud or quiet environment?
3. Are there situations where they would want to use the system on their phone? When do these situations arise? Why do they arise?
4. Are you replacing an existing system? Do people have ways of working around the system? Do people avoid using it? What do they like about it? Why?
5. What are the most common tasks people are trying to accomplish in the current system?
6. What are the most common tasks that people are trying to accomplish that cannot currently be handled through the system? For example, tasks that people must call customer service for assistance.

Again, we are not looking for perfect answers here. You just want to document your assumptions about your customers.

Using the Profiles

Now that you've answered these questions about your Buyers and Users, it's time to put them to use throughout the RFP process. Every time you think about requesting a feature, you can refer to the user profiles:

- How important is this feature to this user?
- What would they do without this feature?
- Could they do their job without the feature?
- Would a Buyer dismiss the product if it lacked this feature?
- Is the lack of this feature a benefit to the product? (Less is more.)

By referring to your profiles throughout the RFP process, you can keep the requirements tight and focused on exactly what you need. It also makes it easier to focus on meaningful solutions rather than rounding out a feature list.

Scope

Scope. The heart of the RFP. This is the first thing (after the budget, perhaps) that agencies will flip to when they're evaluating the project. Scope defines the actual work on the project. Typically, an RFP defines scope in terms of features, functionality, and requirements. These are important, to be sure, but they often result in a laundry-list of feature requests that may or may not have any bearing on achieving the project's objective.

A better approach is to create an RFP that tracks requirements back to specific project goals, making the value of each requirement as obvious as possible .

We'll address defining project goals first, then move to requirements.

Goals

Your project will likely have several goals. I'd strongly advise to keeping the project as narrowly defined as possible, but the ultimate constraint on the number of project goals is budget. If you find yourself with 5 broad-sweeping goals that cross multiple departments and involve dozens of features, yet you're not packing a solid 6-figure budget, you've got a problem.

There are three aspects to defining a useful project goal:

1. Expected Outcomes
2. Wild Success
3. Current Situation

Expected Outcomes

Expected outcomes is the project objective. As the name suggests, it's the expected result of running the project. Another way to think about it: what is the minimal result that would allow for the project to be successful?

Use this format when describing your expected outcomes:

Our goal is to... so that [audience] can... because [business value] ... and will be measured by...

Here are some examples.

Our goal is to...	...so that [audience] can...	...because [business value]...	...and will be measured by...
Provide a more engaging website for our visitors...	more easily interact with each other and the site's bloggers...	this will keep users more engaged on the site, driving up page views, and increasing ad revenue...	increased ad impressions throughout the site.
Increase the productivity of our customer support personnel ...	handle a larger call volume...	our current personnel needs to be able to handle 2x the current call volume...	decreased amount of time current personnel spend on support calls.
Make it easier for our customers to complete their purchases...	we can decrease drop-offs during checkout and increase conversions...	more than 50% of people who start checkout do not complete their order...	a 10% increase in conversions.

Wild Success

If the Expected Outcome is the minimal result for success, Wild Success is your stretch goal. It's the result that would blow you (and your boss) away. It exceeds any expectations and is probably unachievable within a single project.

But defining your wild success provides more information more than just the results you're looking for. It might reveal underlying objectives that haven't been captured elsewhere. You might also find that your vision of wild success is a bit closer than you realize. It also doesn't have the stringent format that your goal does.

Wild Success Examples

1. We want a website that people enjoy using. A website that they look forward to visiting every morning. When they wake, they read our site over their morning cup of coffee rather than read their newspaper. More importantly, every article they read has that wow factor that makes them want to share it with all their friends.
2. We want to cut our support call time by 75% while doubling customer satisfaction.
3. We want to make it so easy and enjoyable for people to checkout that once they start the process, they don't want to stop.

Current Situation

To give enough context for the Expected Outcome and Wild Success, you need to define the current situation in detail. If there is a current system that is being replaced or redesigned, include the current technologies being used as well as how critical it is to use these technologies as part of the redesign. In addition to technologies, include a review of what you like about the current solution as well as what you don't.

Requirements

For every goal, you'll build a set of requirements. By itself, the term "requirements" is far too nebulous. I've read some RFPs that specified down to the pixel the various features they needed for their site. Often, what people think is thorough ends up hog-tying their chosen vendor into a set of requirements that may not actually be the best way to achieve the goals of the project.

So how do you know which requirements you need to include in your RFP?

Use these two guidelines:

- Include only Business or Technical Requirements, not specifications
- Include only must-have requirements.

Include only Business or Technical Requirements, not specifications

Requirements are not specifications. A requirement specifies that something must be done, not how. In contrast, a specification defines how that thing is done.

If one of the project goals is to increase engagement on the site, and you know that you need to integrate with popular social media sites to do so, there's no need to specify exactly how that integration should occur.

For example, this requirement is a specification:

Integrate with Facebook, Twitter, and Reddit via their APIs to allow users to easily share every page on the site

This example is better, but still probably too specific:

Each article posted to the site should have sharing options for popular social media sites.

Instead, if integrating with social media sites is something that must be accomplished for the success of the project, try this phrasing:

Key pages and sections of the site must be easily shared on popular social media sites.

It's simpler and allows the vendor to work with you during the Design portion of the project to identify what those "key pages" are. And it allows the technical team to determine the best way to achieve that integration.

Technical requirements may also be included here. Technical requirements generally describe a technology that must be used. For example, if you require the integration of your CRM with your user registration system, this is a technical requirement and should be identified as part of the relevant goal (which may be, "streamline user registration").

Include only must-have requirements

Only the requirements that are needed to make the project a success should be included.

If you throw every requirement you can possibly think of in your RFP, you will obfuscate the key requirements that will help you achieve a specific goal.

You also run the risk of hiring a mediocre firm that promises to deliver everything you

asked for. Then, once the project starts, you've now created a long list of requirements that you have to go through, increasing the risk that the key requirements are missed.

The right vendor can actually help you identify the best features and functionality to achieve your goals. Most likely, they understand the available technologies and opportunities better than you.

If you find yourself in a situation where a laundry-list must happen, try to separate the "Must-have" features from the "Nice-to-have" features.

Those Nice-to-Haves

If you follow these two guidelines, you'll probably have a list of things that you would *like* to fit into the project that don't make it into the RFP. This is okay. You can cover these things during the Discovery process. Your vendor will figure out if they can fit into this project.

I would encourage you, though, to review your list of exclusions carefully. If there is anything that is an absolute must-have, you should add it as a requirement (using the above guidelines).

Budget

Despite being one of the most important aspects of the RFP, and a key point in the decision process, many companies opt to leave their project budget out of the RFP.

The reason most often given: they want to know the vendor's real cost of the project. It generally stems from a feeling that a vendor will max out the budget while delivering as minimal value as possible.

But that's not likely to happen -- especially if you're working with vendors that bill on Time and Materials. Even if you find a few vendors trying to max out budget and minimize output, the proposals from other vendors will actually reveal the practice.

But here's the truth about budget (and why it's so critical to writing a successful RFP):

Budget is the single factor in defining scope.

Without a budget, you hamstring your potential vendors in determining whether the project is a good fit for them. You might think this is the cost of doing business as a

consultant, but you're also wasting your time as you have to evaluate every proposal that comes across your desk.

Let's take an example. Say you're looking for a car. When you describe it to the sales person, you say that you want it red, fast, and convertible.

Great! Without the budget as a guide, you could be happy with either a Mustang, Porsche, or Ferrari. All great cars, but if you are expecting a Ferrari and are given a Mustang, you're going to be unhappy.

It's even more extreme with project work. I can deliver a proposal for a project that costs \$50,000 and another, for the same functionality, that's \$300,000. The difference would be in the level of customization, integration, and polish that we can provide. As someone who is passionate about this work, I want to provide you and your company with the right solutions and as much value as possible given your budget.

Maybe you're not convinced -- or maybe it's against company policy to include a specific budget. If you can't reveal the actual budget, the next best thing would be to provide a range. Try to make the range as narrow as possible and explain the range. What do you expect at the low end? What do you expect at the high end of the range?

Sidebar: Do you reveal the full budget?

No. Keep 15-20% of the budget in reserve. There will always be scope issues, unless your vendor signs a contract in blood saying that there will not be any scope issues (I wouldn't trust that vendor). Unless you like going back to your boss or committee to get additional funds, I would encourage you to keep some in reserve.

Resources

Include a breakdown of your project team. For every team member, you should include both their role within the company as well as their role on the project. Some critical project roles to identify:

- *Business Owner.* Who owns the project? Who is ultimately responsible for the success or failure of the project?
- *Key Stakeholders.* What departments are affected by the projects? The managers or directors of these departments are considered key stakeholders.
- *Influencers.* Anyone that influences the decision of a Key Stakeholder or Business

Owner.

- *Project Manager*. The main point-of-contact for the project as well as the person that will keep your project team on task and on deadline.
- *Available Resources*. Any team members that will be available to augment the design or development work required for the project. No names need be given for this, but roles would be useful.

Time

The second biggest constraint on a project is timeline. Even if you have unlimited funds, without the appropriate amount of time to conduct the appropriate process, you won't succeed.

In the *Mythical Man Month* Theodore von Kármán describes this idea using a wonderful metaphor: "Everyone knows it takes a woman nine months to have a baby. But you Americans think if you get nine women pregnant, you can have a baby in a month."

What a great quote. It captures the challenges of project management so well: Projects take time and while additional budget can accelerate a project, it can't reduce it to zero. And at some point, you do see diminishing returns (due to coordination and quality) from adding people to the project.

So, what are the important dates that affect timeline?

- Vendor Selection Timeline
- Project Start Date
- Key milestones and events
- Vacation and Holidays of key team members

Vendor Selection Timeline

In the 15 years of consulting, I have never seen a client select a vendor and start the project on the date they said they would. Vendor selection process generally takes longer than you expect. You'll get more proposals than you expect, an unexpected critical project will take precedent ("from the CEO herself!"), or a key decision-maker is sick. You get the picture.

So, we reviewed the actual process earlier in the introduction, but you don't need to include all those details and dates in the RFP. You just need:

1. Deadline for questions
2. Dates for live Q&A events
3. Deadline for RFP submission
4. Presentations & Vendor Selection
5. Announce Selection

Project Start Date

Your project will more than likely start late. Vendor selection, legal, and any required paperwork always takes longer than anyone wants or expects.

Key Milestones

Key milestones include the desired launch date, important conference and tradeshow where you will need something to demo. If possible, also include any dates that have been promised to senior executives. If not possible, those should be mentioned to your chosen vendor as soon as possible when the project starts.

Other Important Dates

Less important dates, but dates that you should have available during your first meeting with your chosen vendor: any planned holidays or vacation for staff critical to the project.

Sidebar: Beating the Clock

Some things just take time and no matter how many resources you throw at it, you can't make it go faster.

But what are your options when you do need to get something done faster? Simple: reduce scope. (Okay, maybe not so simple in practice, but it sure rolls off the tongue easily enough.)

Reducing the number of features is the only way to guarantee a faster launch. You can throw more people at the problem, but there will be bottlenecks somewhere -- project knowledge or approvals that can only come from a limited number of people, or just coordinating between multiple development teams. (Seriously, go read *Mythical Man Month*.)

So the best thing to do is focus the efforts of critical staff on the most important features by reducing scope. Then, after launch, immediately roll into the next set of priorities.

After Scope, Budget and Timeline, What Next?

While scope, budget, and timeline are the most important elements of the RFP, there are several other items that you'll need to include.

<i>Project Summary & Objective</i>	A short description of the project the single over-arching objective that connects all the goals and features.
<i>Target Audience</i>	A short description of the primary and secondary audiences for the project.
<i>Current technical environment</i>	An overview of any current servers and technologies used. Note which technologies must remain in place and which will be replaced by the current systems. If you require the use of certain technologies, note it here.
<i>Ongoing support and maintenance requirements</i>	
<i>Content development needs</i>	Do you need assistance writing content? Include those requirements.
<i>Background on your organization, contact info</i>	
<i>Selection Criteria</i>	What criteria will you be evaluating? Details on this below.

What to request from vendors

Whatever you request: keep it simple. It's good practice to set expectations, but the more you ask for, the more you'll have to evaluate.

About the Company	When it was founded, who founded it, and why? What is the background of the leadership team? This information tells you more about the bias of the company than anything else.
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Process	How the company defines their process. This is less to compare between vendors and more to eliminate any vendor that doesn't have well-defined and well-articulated process. Trust me, you're gonna read many descriptions of many stages that will all start to run together and sound the same. Don't get too hung up on understanding each vendor's exact process. You just want to know how they think about running projects.
Proposed Solution	This is the meat of their proposal. Second to budget, this is what you want to see. Are they addressing your main goals and objectives?
Estimated Timeline	Don't expect the vendor to put together a complete timeline. Project schedules take a lot of time to put together and will change on a weekly basis.
Deliverables	Vendors should include a list and description of their typical deliverables.
Budget	The vendor's projected budget. It's generally a good idea to ask that the vendors separate the financials from the narrative so that you can quickly review the budget.
Bios	Bios of key team members. These may or may not be the folks that work on your project. It's unrealistic to ask the vendor to put commit a project team to you based on an RFP, but these bios give you a sense of the leadership and staff within the company.
References	Ask for 3-5 references. This is possibly the most important aspect of the request and may not always be included in proposals unless explicitly requested.

Evaluating Vendors

Now we've reviewed the core components of the RFP. But what happens when you get the stack of proposals? How do you evaluate them and the vendors that they represent?

I recommend evaluating vendors across five criteria:

1. Price
2. Technology Fit
3. Expertise
4. Process
5. Relationship Management

As you evaluate each of these criteria, you'll also be looking deeper at each vendor. You want someone that not only looks good on paper, but that you know can deliver the product that you need (even if it's not necessarily the one you're asking for). There are three additional qualities that give you a holistic look at the vendor:

1. Creativity
2. Empathy
3. Personality

Let's start by examining the evaluation criteria.

Evaluation Criteria

Price

Let's face it. No matter how great the personality fit, how great the firm, or how perfect the fit, if their proposed budget isn't within or at least close to your available budget, it's not going to work. So this must be the first criteria. It's also the simplest to evaluate. Does their price fit your budget? If it doesn't, straight to the "no" pile.

A word of caution here. If you find yourself putting well regarded vendors in the "no" pile, you might want to re-evaluate your scope or budget -- or both. You may have underestimated the cost of completing your project -- or it might be a simple matter of removing some extras that you've thrown in, but didn't tag as "Nice-to-Have."

Technology Fit

A *Technology Fit* refers to the proposed technologies that the vendor intends to use on the project. In general, vendors who specialize in Ruby on Rails won't waste their time submitting a proposal to someone looking for a Drupal vendor, but the technology fit goes much deeper than just chosen programming language and platform.

Sidebar: Questions to ask about the technology

1. Do the proposed technologies fit within your current infrastructure?
2. Do you have the resources to support any new technologies the vendor is proposing?
3. Does the vendor explain clearly the reasons for the proposed technologies?

Expertise

When you evaluate a vendor's expertise, you're trying to determine their qualifications. There are several ways to evaluate their expertise. You should read their blog, look at any talks they've given at conferences (at least the title and description of the talk -- watch it if you can), and any articles they've written.

In addition, there are two other key ways that you can evaluate a vendor's expertise: their portfolio and their presentation.

Portfolio

Of the projects they featured in their proposal (if they did) and those they feature on their website, do they have any that are similar to your project? If they haven't given you a reference contact for one of those projects, consider requesting one. Even if a project is not similar to yours in feature-set, look for ones that might be similar in complexity.

Judge each project through the lense of the company that paid for it. You might not like a certain design, but if the client loved it, then the project was a success.

Presentation

When a vendor presents, you're not just evaluating what they're telling you, you're also evaluating what they ask of you. You want to get a sense of how they are going to push you -- and whether they have valid reasons for guiding you in a particular direction. Are they trying to understand the core problem you're trying to solve by asking insightful, clarifying questions? Or are they accepting your answers, which can, at first, seem like the right response. You want someone who's going to build something that solves your problems -- not just take orders.

Sidebar: Questions to ask about their expertise

1. What was a particularly challenging project and why?
2. What project are you most proud of and why?
3. If it's not already clear to you from the vendor's portfolio, which project(s) have they done which are most similar to yours, and what did they learn from them?

Process

Every vendor has a process. Waterfall. Lean. Agile. Iterative. Call it whatever you like, but it's critical that you understand your vendor's process as well as whether that process can integrate effectively with your company's culture. Here are a few things to look for in a good process.

Requirements Gathering

What is the vendor's process for ensuring that they have identified all your requirements? This is often done through a kick-off meeting and follow-up interviews.

User Research

Typically, a requirements gathering process focuses on business and market requirements. The User Research phase gives the vendor time to explore the user needs. Often this research can inform the development of personas and scenarios. Spending a few weeks early in the process, if budget allows it, can ensure you're meeting the most important user requirements and are on your way to a successful project.

User Experience Design

Once you have requirements, the next step is to translate the requirements and user research into wireframes and workflows. While not always specifying exactly how the final product will look, they do allow for rapid iteration of concepts and interactions without the added cost and weight of working in code.

Usability Testing

Usability Testing can occur at several points in the project: In the early stages with low-fidelity prototypes, or later, you can test a working version of the site. These tests can help you refine the project as well as help inform future phase development.

Creative

If your project has a customer-facing component, you will generally go through a creative process, possibly including defining or redefining your brand. Depending on the vendor, you may also spend some time defining the visual language of your site through style tiles. You'll get comps that define how the site should look. Pay attention to how the creative group works with both their front-end developers and user experience team. Their working relationship will determine how fast and accurately things move along.

Development

At this point, you've reached the actual implementation phase! Although the pace and

volume of client/vendor interactions will slow, your availability is still crucial. Even the most thorough planning processes will inevitably have small holes, leading to questions about interactions that haven't been considered. Refinement of the specifications with you the client is a normal and healthy part of the process.

Themeing / Front End Development

In most projects, front-end development will take place relatively close to the end of the timeline. This can be frustrating, because momentum will have seemingly slowed, or if you view progress, it may be functionally complete but not look anything like what was promised at first. But be patient and know that the design comps are going to come into play at this point and once themeing begins.

Transition -- QA, testing, documentation, training.

The vendor's process and budget should clearly define time set aside for this critical last piece of the project. Depending on the complexity of the project and needs of the users, transition hours should comprise anywhere from 10% - 20% of the total budget. That may sound like a lot, but it's a reasonable expectation.

Sidebar: Questions to ask about their process

1. How much input do you have at each level?
2. How well do the different teams work together?
3. How easy is it for you to make changes at each phase?

Relationship Management

Along with cost, a solid process, a good technology fit and the required expertise, the key to any successful engagement is the relationship and how your vendor plans to manage it. You need to feel confident that the vendor has a team available and the account management processes in place to give your project the attention it deserves.

And rapport counts. If you're not feeling it in interactions with the vendor now, you very likely won't once you get started, either. Ideally you're looking for a long-term partnership so that you don't have to go through this process again for your next phase or project.

Account Management

Sometimes called sales. Sometimes called client relations. Regardless, this is the person (or people) who manages your project up to the point that it is signed. Hopefully you'll build a strong rapport with them and, ideally, they remain a part of the project team in some capacity.

Do you get the sense that your account manager is going to dump you onto the project team once they get their commission? Or are they going to stick around and ensure that everything goes smoothly?

Sidebar: Questions to ask about Account Management

1. How would you describe most of your customer relationships?
2. How many companies have you worked with on more than one project?

Project Management

A project manager is the grease that keeps your project moving smoothly. They are the people or person who will make sure that your project is on track, that the team is setting a schedule and sticking to it. While the project manager won't help build your project, they will be instrumental to its successful deployment.

Sidebar: Questions to ask about Project Management

1. How do you handle budget concerns? Can you give an example?
2. What parts of the project are the riskiest and how do you plan to control that risk?
3. If we had to reduce cost, what parts of the project would you suggest we cut?

Customer Satisfaction

How satisfied have previous customers been with the vendor? In your RFP, you'll request references from each vendor and you'll want to make sure you talk to them!

Of course vendors will give you their best references. But you shouldn't be afraid to ask them tough questions. And don't stop there. During the vendor's presentation, ask about tough clients that they've worked with. How did they handle the situation? Their answer will be telling. Do they blame the client? Do they take responsibility for the situation? Do they offer ways that they could have improved the situation?

Sidebar: Questions to ask references

1. Would you recommend the agency to a colleague at another organization? Why?
2. What was the most difficult part in working with the agency?
3. Why should I hire them?
4. Why should I not hire them?

Warranty

Does the vendor offer a warranty / support period after the site is handed over to you? This should be spelled out so you understand what the vendor is responsible for versus what

will fall to your team. It's not a good sign if this isn't addressed in some way in the proposal. If it isn't, but all other aspects of the proposal look good to you, you should request documentation of it. This information should also appear in the service agreement; you can always request a sample agreement to review.

Bluespark offers a three-month warranty after site handover which covers bugs that are not the result of code changes by your team. Note that the handover date is very rarely the same date as your launch.

Maintenance

You may be planning to take over maintenance of the site after handover, but if your resources don't allow for that, then be sure to discuss post-handover maintenance. Most companies offer this and you can request a sample maintenance agreement to review.

Core Qualities

Picking your vendor from an RFP process is a lot like picking a spouse from a job interview. It's difficult to know absolutely for sure that you've found the perfect match. You're not just looking for someone that can deliver the project at the estimated price, you're looking for a vendor that understands the spirit of what you're after and can translate that to an experience that meets or even surpasses your expectations.

There are three core qualities to a great vendor that can't easily be packaged into a proposal or expressed succinctly in a presentation. But when you evaluate the vendor's proposal, their presentation, the questions they ask, their demeanor, you're really trying to ascertain these three qualities: creativity, empathy, and personality.

Above all else, these three will determine the success or failure of your project.

Creativity

Really, this is the key question: Does the vendor have the creativity to deliver on the project? Not just artistic creativity (though that may be the expertise you're looking for) but the ability to get to the heart of the problem and come up with unique solutions that fit your budget.

Empathy	Empathy for both you and your customers. Do they understand the challenges you (and the internal project team) face within the organization? Can they empathize with your various users (both internal and external) and help you translate those needs into project priorities?
Personality	<p>You have to work with this vendor for the next 3-12 months. Might as well make sure you like them! Of course, you're going to be working with different people on the project, but most vendors have a culture that attract certain personalities.</p> <p>Avoid the divas. Sometimes they produce great work, but often at the expense of other aspects of the project. Your best bet is to find a team that seems to click and work well together -- one whose company you enjoy because you can feel the respect they have for you and for the project.</p>

Our End, Your Beginning

So we've reviewed the critical factors to a successful RFP. We've looked at the RFP process as a whole and explored some of the criteria for selecting a vendor. Now it's up to you to take these ideas, capture what's most important to include in your RFP, and find the best vendor for your project.

Who knows, maybe we'll end up working together some day! (We're guessing you've known all along that this was part of our motivation for writing this paper.)

We'd love to get feedback from you on how helpful (or not) this paper was for you. Will you take a moment to [contact us](#) and give us your thoughts?

And while you're at it, [join our mailing list](#). You'll get first crack at future articles and whitepapers.

