CORPORATER

Writing Rfp
Doesn't Have To Be Hard.

Read these 12 Guidelines.

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As a vendor that has seen countless RFPs from customers, we have some general guidelines:

1 Ask for best practices

Allow vendors to exhibit best practices by using user stories when appropriate. These should describe the roles of users and outcomes or activities that are performed by the users, rather than specifying functionality.

2 Ask for descriptions

Rather than asking yes/no questions, ask vendors to describe how they would solve or address your business requirements. Not only will this give you better information about how the solution works, but it will also give you insights into how well the vendor understands your actual business needs.

3 Anchor requirements to the business

Categorize the business value if using functional requirements. This anchors your requirement against an outcome or objective.

4 Promote clarity

Avoid combining too many concepts within a single requirement. This makes it difficult to understand if responses are scored as partially compliant.

5 Keep the solution design simple

Keep your vision of the finished solution simple—remember that users will need to adopt and use this solution. A complex solution can quickly turn into a black box, where it is no longer apparent how basic things function. Keep it simple!

6 Be future-minded

Leave room to grow – as a corollary to the previous point, don't make a short-sighted decision that will leave you replacing your solution with something more robust within a year or two. Understand the potential of your solution, and consider where you want to take it in the future.

7 Keep the RFI simple

Make it easy to respond to your RFP – adding many degrees of must-have, nice to have, desired, etc. makes your intentions unclear. Likewise, offering too many options that define the level of vendor compliance will result in a confusing reply. Always assess the cost of meeting gaps between the solution and the requirements.

8 Avoid repetition

If aspects like access control, or reporting are part of each solution area, treat them as separate functional categories, rather than repeating them in each section. List an assumption or a requirement stating that the feature applies throughout the solution.

9 Keep it relevant

For technical requirements, ask specific questions related to your technical environment.

10 Use a phased approach

Break the project into phases if you do not plan to implement everything at once. It reduces risk, provides a better basis for cost estimation, and it makes implementation planning more manageable.

11 Consider using a pilot

Starting the project with a pilot, with a limited scope, and limited roll-out can reduce risks, can validate the overall approach, and can deliver faster results. Using an agile approach, you can rapidly test this with users, and make adjustments more easily, before it is widely in use.

12 Clarify your uncertainties

Use a clarification meeting with the vendor to ask control questions for issues that may rely on a workaround or coding to solve.