



Sample RFP (or RFQ) Outline

Part A – Information for Bidders (no response required)

1. Instructions to bidders
 - Response format, contacts, timelines, due dates
 - Differentiators/evaluation criteria
2. Background information
 - Strategic directions and goals
 - Operational overview
 - Sites, sizes, functions
 - Technical overview
 - Voice and data applications and infrastructure
 - Implementation plan/target phasing

Part B – Bidder response required

3. Solution overview
 - Descriptive overview of proposed solution
 - Feature/function
 - Technical
 - Implementation
 - Support
 - High level diagram of proposed hardware and software elements, and integration with environment
4. Functional requirements
 - Features and functions identified (based on specific technology lists)
 - ACD
 - Routing
 - Reporting
 - CTI
 - Home agents
 - System administration and management
 - GUI
 - IVR
 - Etc.
5. Technical requirements
 - Architecture, platform, network, software, and integration needs (based on specific technology lists)
 - Redundancy/availability, business continuity/disaster recovery
 - Management tools
 - Power requirements
 - Development, test, QA, production
6. Implementation requirements
 - Processes
 - Sample project plan
 - Roles and responsibilities
 - Professional services
 - Testing



- Training
 - Documentation
 - Resources
7. Maintenance and support requirements
- Warranty
 - Support coverage
 - Options (e.g., 8-5, 24x7)
 - Access and resources
 - Support processes (e.g., remote support, dispatch scenarios)
 - Software updates
 - Support resources
 - Service Level Agreements
 - Release history
 - Product roadmap
8. Vendor information
- Supplier background and profile
 - Experience and qualifications
 - Similar size implementations
 - Similar functions
 - Similar industry
 - Partners included in proposed solution
 - Financial considerations
 - References
 - Sample contract
9. Pricing
- Configuration
 - Clearly defined model (or models) that the vendor should price the solution on, including professional services expectations
 - Pricing tables
 - Licensing structure
 - Maintenance pricing
 - Ongoing professional services pricing
 - Optional items

Typical response element structure

Below is the typical structure we use for key areas of functional and technical requirements, and other appropriate areas.

For all numbered items, vendor must indicate compliance according to the following options:

FC = Fully Comply with standard offering

PC = Partially Comply with standard offering (explain in text)

CC = Comply with custom solution (explain in text)

TC = Comply with third party solution (explain in text)

NC = Do not comply

Also, vendor must indicate the specific product(s) that provide the stated capability.

Vendor is then required to respond to each requirement according to the following, plus any text response.



FC PC CC TC NC (indicate one)

Product(s): _____

Representative Table Structure

In some sections, we seek information from the bidders in a tabular format to ensure they provide clarity on roles and responsibilities and deliverables. We use tables for things like training, partners and their roles, testing, deliverables, and desktop requirements and integration. The table below provides a sample for training.

Training

Provide a suggested training plan including all training required to effectively use, apply, and support the proposed solution with a clear indication of what is included in the quote and what is not. Indicate the number of seats of training for each training class included in the price. Indicate which training is on site side-by-side (formal knowledge transfer), which is classroom on site, which is classroom at a vendor training facility, and any training that is web or computer based. Include initial and ongoing training. Use the table below. Break out and provide a table by product (ACD/Routing/Reporting, CTI/MM, IVR, etc.) as appropriate.

Training	Included or Optional?	Number of Seats	Location/Mode (on-site, vendor location, online, etc.)
End User - CC agents			
List all training classes...			
End User – CC supervisors			
List all training classes...			
End User - general business/enterprise positions			
List all training classes...			
Analyst (e.g., reporting)			
List all training classes...			
Administrator - technical			
List all training classes...			
Technical support staff			
List all training classes...			



Training	Included or Optional?	Number of Seats	Location/Mode (on-site, vendor location, online, etc.)
Other			
List all training classes...			