RFP/I/Q – Starter Outline

Strategic Contact's outline starter is below. We use this, along with specific functional and technical frameworks for the appropriate products/services, to craft the appropriate outline for the project. Match the rigor of documentation to the situation – size, timeline, types of solutions and vendors, etc.

1. Instructions to bidders
   - Response format, contacts, process, 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 and Support expectations
3. Solution overview
   - Diagram of proposed hardware and software elements, and integration with environment
   - Descriptive overview of proposed solution
4. Functional requirements
   - Key features and functions identified (based on specific products/services)
     - Mandatory and optional
     - Near term, future
     - Compliance with specific requirements
     - Targeted questions
5. Technical requirements
   - Architecture, platform, software, integration, security, reliability, etc.
   - Based on specific products/services and sourcing strategy
6. Implementation requirements
   - Approach and timeline
   - Resources, roles and responsibilities
   - Testing
   - Training
7. Maintenance and Support requirements
   - Monitoring and management, NOC, help desk, etc.
   - Options (e.g., business hours, extended business hours, 24x7)
   - Processes (e.g., backup, upgrades, escalation)
   - Service Level Agreements, remediation
8. Supplier information
   - Experience and qualifications - similar size, functions, industry
   - Partners included in proposed solution
   - Financial considerations
   - Agreements/contracts
   - References
9. Pricing model
   - Clearly defined model (or models) that the vendor should price the solution on, including licensing and professional services expectations
   - Maintenance pricing (for products) and/or account management (for services)
   - Optional items