



# Vendor Management – Request For Proposal (RFP) Process

2 Days | Onsite

Selecting the right vendor and vendor solution is crucial for businesses. Since vendors are not under your organization's *control*, there is inherent risk in selecting and maintaining vendor services and solutions.

This course takes you through steps to avoid the issues and risks around the RFP Process and helps you determine what deliverables need to be included in the RFP and how to develop those deliverables. The workshops will provide practice and feedback on those deliverables and set you up for success on your next RFP project.

## Learning Objectives

- Understand the reason behind issuing a Request For Proposal
- Determine the requirements and level of detail necessary to include in the RFP
- Prioritize the requirements
- Develop a schedule for the RFP
- Send the RFP to vendors
- Evaluate responses to the RFP
- Select the appropriate vendor

## Intended Audience

This course is designed for project managers and business analysts involved in the vendor and product selection process.

## Prerequisites

We recommend that the student has already attended our Essential Skills for Business Analysis class or have equivalent experience before enrolling for this course.

## Learning Topics

Topic	Time
<b>Introduction</b>	.5 hour
<ul style="list-style-type: none"><li>• What is a Request for Proposal?</li><li>• Introduction to the RFP process</li></ul>	
<b>Scope</b>	4.5 hours
<ul style="list-style-type: none"><li>• Scope the RFP Effort<ul style="list-style-type: none"><li>○ Understanding the Business Need for the RFP</li></ul></li></ul>	

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<ul style="list-style-type: none"> <li>○ Identify Problems or Opportunities</li> <li>○ Identify Key Objectives</li> <li>● Workshop: Start to Scope the RFP Project</li> <li>● Identify Scope of Requirements <ul style="list-style-type: none"> <li>○ Identify Capabilities Affected by the Problem/Opportunity</li> <li>○ Identify Impacted Parties and High Level Data using the Context Level Data Flow Diagram</li> <li>○ Identify Business Risks based on Impacted Parties</li> </ul> </li> <li>● Workshop: Complete the Scope of the RFP Project</li> <li>● Determine the Level of Detail Needed in the RFP based on Scope</li> <li>● Workshop: Determine Deliverables to Produce for RFP</li> </ul>	
<b>Define Solution Requirements</b>	5 hours
<ul style="list-style-type: none"> <li>● Define User Stories and/or Use Cases <ul style="list-style-type: none"> <li>○ Workshop: Determine Sample Use Cases</li> </ul> </li> <li>● Determine Technique to Describe Use Cases <ul style="list-style-type: none"> <li>○ Workshop: Select Technique(s) and Develop Artifacts for Selected Use Case <ul style="list-style-type: none"> <li>▪ Workflow diagrams</li> <li>▪ Screens/Prototypes</li> <li>▪ Use Case Detail/Test Cases</li> </ul> </li> </ul> </li> <li>● Determine Data and Business Rules Involved in Use Cases <ul style="list-style-type: none"> <li>○ Workshop: Document Data and Business Rules for Selected Use Case</li> </ul> </li> <li>● Prioritize Functionality <ul style="list-style-type: none"> <li>○ Workshop: Prioritize Use Cases</li> </ul> </li> <li>● Determine Non-Functional Requirements</li> <li>● Determine Technical Requirements <ul style="list-style-type: none"> <li>○ Discussion: Non-Functional and Technical requirements for your Use Case or Solution</li> </ul> </li> </ul>	
<b>Develop the RFP and Implement Solution</b>	3.5 hours
<ul style="list-style-type: none"> <li>● Develop the RFP Schedule</li> <li>● Review the RFP Worksheet <ul style="list-style-type: none"> <li>○ Workshop: Determine changes needed for your RFP</li> </ul> </li> <li>● Determine Evaluation Criteria</li> <li>● Send RFP to Vendors</li> <li>● Evaluate Vendor Responses</li> <li>● Select Top Vendors based on Evaluation Criteria</li> <li>● Communicate with Vendors Selected <ul style="list-style-type: none"> <li>○ Workshop: Plan Vendor Communication for your RFP (demos, presentations)</li> </ul> </li> <li>● Select Top Vendor based on Results</li> <li>● Negotiate Vendor Contract</li> <li>● Implement the Solution <ul style="list-style-type: none"> <li>○ Workshop: Implementation Planning Items</li> </ul> </li> </ul>	
<b>Class Summary</b>	.5 hour
<ul style="list-style-type: none"> <li>● Summary of Vendor Management and RFPs</li> <li>● Develop an Action Plan with next steps on the student's current project</li> <li>● Student questions/discussion topics</li> </ul>	

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