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RFP TEMPLATE FOR BUYERS

A guide to determine what qualities a valuable talent development solution partner should offer.

INTRODUCTION

So, you're ready to invest in a talent development system? Before you write up a request for proposal (RFP) for vendors to respond to, it is important to determine what qualities a valuable talent development solution partner should offer.

The opening section of your RFP should outline your objectives in detail. Doing this serves two purposes. It helps the vendor better understand what you are looking for. They will be better able to communicate the things that are important about their solution and how to do business with them. It also helps you to level-set internally about the type of partner you need. For example, if your objectives need to be fleshed out further, you will want to identify a vendor with a consultative approach and the experience to help you do this.

Outlining your objectives can be done by answering the following critical questions in the introduction of your RFP.

- What are you trying to accomplish with this system?
- Why are you looking for in a technology?
- How will your company measure the success of this project?

Once the objectives have been communicated, the remainder of the RFP should ask about the features and functionality of the solutions that are relevant to your business.

To simplify that process, the following is a modularized template for building your RFP. Simply select the sections that apply to your business and put them into your RFP, adjusting as you feel necessary.

The accompanying vendor selection table will help you to evaluate the RFP responses you receive.

VENDOR ATTRIBUTES

- Describe your company's history.

- Provide the total number of employees in your organization.

- What is your global (geographic) reach? List your office locations.

- Describe your industry experience.

- What is your vision/mission statement?

- How do you differentiate yourself from competitors in the marketplace?

- What is the proposed product(s) name(s)?

- What is the current version of the proposed product(s)?

- Describe the various modules that are included as part of the proposed solution. Detail specific modules/functionality that are fully-integrated core capability vs. any modules that will require that an interface be built and or maintained?

- Describe additional modules available that are not being proposed.

- Describe your roadmap process and main roadmap themes? How much input do your clients have in making your final list of enhancements?

PRODUCT FEATURES

TALENT MANAGEMENT

In this ever-changing digital economy and rapidly changing workforce expectations, companies must have the ability to stay competitive by finding new ways to mobilize, develop, grow and reward their people.

- Is there a user interface for employees and managers?

- Describe the dashboards. Are they role-based? Configurable? What progress can be monitored? What reporting and analytics are included?

- Does the solution include career planning? Skills analysis/position fit? Job search and capabilities?

- Describe the features of the career pathing capabilities in the solution.

- Does it also include succession planning?

- Does your solution offer the ability to build development plans toward a certain role? Does it identify competencies and skills gaps?

- What query capabilities exist to easily find review and filter feedback a user has given or received?

- Does the solution offer visual indicators to monitor priorities and progress against cascading goals?

- Does the solution offer employees personalized contextual development recommendations? On what basis are these personalized?

- Does the solution support real-time feedback? Adhoc feedback requests?

LEARNING MANAGEMENT

Learning is the heart of HR and HR Technology and the solution should provide your employees with a learning ecosystem that supports the employee lifecycle.

- Does the solution manage learning across the employee lifecycle, including onboarding and training throughout their career?

- Are learning recommendations personalized to the user? On what is it personalized?

- Does the solution support certification and compliance needs?

- What features are available for social learning and collaboration?

- Does the solution have offline support?

- Are there form-based approvals?

OTHER TECHNICAL REQUIREMENTS

- Is the system configurable to any process that is currently in place? Will we need to change any processes to employ this solution?

- Is the technology able to handle a complex environment [add specifications]?

- Is the solution available for implementation on-premise, in a private cloud, as well as SAAS? Can we begin with one delivery method (e.g. private cloud) and later decide to move to another delivery method (e.g. SaaS)? If so, is that a simple transition with no loss of functionality or re-deployment required?

- Does the solution include features for talent acquisition?

- Can you extend learning outside of the organization, to partners, resellers, etc.?

- Does the solution integrate with all of the major learning content providers?

- Does the solution offer other capabilities, such as compensation planning, approvals and global compensation management?

EMPLOYEE/USER EXPERIENCE

- Is there a limit to the number of users?

- Does the solution offer a consumer-grade experience?

- Does the solution provide learners with their modality of choice (desktop, mobile, tablet)?

- Is there a full parity of features across devices?

- To what extent does the user experience leverage gamification and social to stimulate engagement?

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SOLUTION PRICING

- What is the cost of the solution?

- Detail ongoing costs (subscription, maintenance fees, hosting, etc.)

- Are you proposing any additional pricing options? If so, describe.

- What discounts do you offer for long-term contracts?

- Identify any other costs associated with your proposal.

- Detail your assumptions.

IMPLEMENTATION SERVICES

- Provide your implementation methodology.

- Provide some of your best practices and recommendations regarding the implementation.

- Provide an overview of the process that will be used to implement your system. Include a high-level timeline of the process.

- Describe your implementation keys to success.

- Detail the responsibilities/resources of both your team and our team for the implementation.

- How do you address communication with the project team?

- Describe your implementation training.

- How do you manage and control costs and delivery timelines during an implementation?

- How is legacy data integrated into the system?

- What is the average length of a typical implementation?

- Do your employees implement your solution, or do you use a third party?

- Detail your implementation team's experience.

- Provide sample implementation team resumes.

SUPPORT

- Describe the service support options that you offer for the system. Identify hours of operation and other relevant information.

- Describe your documented online technical support process and support team available.

- Describe your escalation procedures.

- Do you offer any online support mechanisms for your customers?

- Describe your service team's experience and if they are outsourced.

- Describe your account management approach.

- Have you won any awards for your support services?

- How do you ensure feedback from your customers?

- Do you have a user group or conference?

- How are product upgrades handled?

- Are customers notified of upgrades? If so, how?

- What sort of product documentation are we provided with?

- Describe the training options available for your solution.