

RFP DEVELOPMENT AND VENDOR SELECTION

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Introduction and Overview

This document is one of a series of white papers prepared by Enterprise Integration Group (EIG) to help clients understand EIG methods and processes. EIG is a leading provider of programming and design services that deliver superior customer self-service solutions to the enterprise. EIG is regarded as the “Gold Standard” in IVR best practices and human factors.

What is RFP Development and Vendor Selection?

EIG’s RFP Development and Vendor Selection service is made up of two basic deliverables: First, a customized Request for Proposal (RFP) document which identifies in great detail, all of the requirements, specifications, system sizing and feature sets that you require in a new or upgraded IVR platform. Second, we recommend which vendor should be selected to provide the specified platform. Enterprise Integration Group (EIG) is a good partner for this process owing to our extensive experience with many IVR platforms and our vendor neutrality.

What is the Value of EIG’s Vendor Selection Service?

Besides EIG’s objectivity there are several benefits to using this service. First, by working with EIG, you are able to take advantage of a tried and true methodology for creating RFPs. This helps you to avoid “hit and miss” problems with developing a specification, scoring tables, weighting considerations and other criteria. Although all of these items and more can be tackled by your in-house staff, it actually takes years to develop a methodology that works consistently. Not only does the EIG approach save your staff time, so the project comes in on budget, but it ensures that the correct questions are being asked so a true “apples to apples” comparison can be made.

Secondly, based on years of experience with many platforms and their makers, EIG will be able to help you come to the correct decision of who to do business with. This is a daunting task that can sometimes be intimidating for your employees. Why? No one wants to pick the wrong vendor or the wrong technology and be blamed for a disaster. EIG is able to guide you in this process because we know each vendor’s strengths and weaknesses. The decision becomes less emotional and more scientific. This provides some “insurance” that you are making the correct decision.

Methodology

As you can imagine, the selection process for such an important process can be confusing. There are many criteria with which to base your decision. These include:

1. Optimizing your current infrastructure and compatibility with the call center
2. Matching the skill sets you have to the proposed platform for maintenance
3. Return on Investment Calculations
4. Viability of the vendor in question
5. Reliability of proposed platform; performance track record
6. Extensibility and scalability of the platform (future proof)
7. Standards-based implementation vs. Proprietary
8. Advanced technology considerations (Speech Recognition, TTS, etc)
9. Impact of selection on project management, implementation, training

RFP Development

EIG's proprietary process of RFP Development and Vendor Selection is based on over twenty years of experience of its top consultants. The process includes proven methodologies for:

1. The development of technical and functional requirements;
2. Establishing Compliance;
3. Assessing Degrees of Compliance;
4. Assessing Adherence to Operational Timeframes;
5. Developing the Scope of Work and Timetables for Deployment;
6. Establishing RFP response rules (incl. vendor questions & delivery of proposals; discrepancies; confidentiality; response scoring methodology, etc.);
7. Establishing contract stipulations, terms and conditions;
8. Assessing vendor qualifications;
9. Return on investment methodology;
10. Methodology and definitions for system sizing; and
11. Adherence to overall system requirements and architectural goals.

These processes seek to establish the most important facts about each offering and match these facts against a comprehensive scoring system that will lead the client to the best and most cost effective solution.

Vendor Solicitation

Initial Vendor Solicitation is the next step after developing the RFP. EIG will manage this RFP process as follows:

1. Develop vendor mailing list
2. Obtain non-disclosure statements from vendors
3. Mail RFP to vendors

RFP Response Evaluation

1. Make preparations for bidder's conference
2. Act as single point of contact for vendor questions
3. Develop and disseminate responses to vendor questions
4. Hold weekly conference calls with your team throughout bidding process
5. Make arrangements for demonstrations
6. Provide ranking of demonstrations

EIG will then review RFP responses and rank based on agreed-to decision criteria.

Vendor Recommendation Service

EIG will also participate in presentations from vendor finalists and make recommendations regarding vendor selection. These recommendations will be made based on the selection criteria established in the RFP process. The recommendations are manifest in a Final Report. (Vendor contract negotiation is outside the scope of this effort.) This includes:

1. Development of Vendor/Solution viability matrix
2. Final Report to include strengths and weaknesses of each vendor
3. EIG to conduct due diligence on finalists by contacting reference accounts
4. Conduct site visits if deemed necessary.

EIG applies an internal peer review system to control the quality of the RFP Development and Vendor Selection. It is not unusual for an EIG audit to pass across several expert eyes before the final recommendations are released to the client. In addition, there are many other services EIG can provide. These services include IVR Audit, Benchmarking and Script Review, Strategic Planning Service, IVR Detailed Design, IVR Data Collection and Reporting Audit, Usability Testing, programming and development, and total project management.

Timing

RFP Development and Vendor Selection offers a thorough analysis of a client's IVR and associated infrastructure needs and solid advice on what vendor solution will be the most successful. Timing depends on the size of the project, and so a single estimate is not possible to provide in a white paper. A good rule of thumb for the range of times is from six to nine weeks. Our consultants typically require a week or two of discovery, both with on-site meetings and conference calls to collect enough data for a good RFP. This is followed by vendor solicitation, RFP response review, demonstrations, site visits and final analysis. After completion of the analysis, EIG conducts an internal peer review. Typical Calendar Time: Six to Nine Weeks