9

ESSENTIAL PIECES EVERY SUCCESSFUL RFP FOR TECH PROJECTS SHOULD INCLUDE

When you're about to launch a new technology project and you're ready to engage outside vendors, before you send any emails, ask for recommendations or make any phone calls, check out these 9 essential pieces every successful RFP for tech projects should include.

An RFP, which stands for request for proposal, is just what it sounds like. It's a document that asks for proposals. An agency or a company will put out an RFP when they want to start a bidding process for a specific job. The job can be for anything from construction to tech related projects.

An RFP is simply a way to clearly communicate to potential vendors what you need for your next tech project. What are your project specifications? What do you have to have and what are nice to haves? What are your expectations overall?

But sitting down to write an RFP for a mobile app, piece of software, or even a website redesign can be overwhelming. How do you convey what you need without writing a novel? How do you communicate what you need so potential vendors will understand, especially if you're not a technical person?

A good way to start is to break your RFP down into these 9 essential pieces every successful RFP for tech projects should include. Going step by step through each section will get you started on writing a clearer, more effective RFP.

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1. INTRO/EXECUTIVE SUMMARY

This section is pretty straightforward. It's an introduction to your company, your values, and also an overview of the project you're seeking bids on. A good intro eases the vendor into what they are about to read and provides a brief overview of the project and requirements for your product or service.

2. BUSINESS OVERVIEW AND BACKGROUND

It's important for your vendors to know about your company. Don't just give a boring company history. Give vendors some insight into what drives you. What services do you provide? What are your values? What makes you unique? Why does what you do matter? It's important that you select a company that works the same way you do or that has a good value fit. Yes, each vendor wants your business, but a vendor who really "gets" where you're coming from is more likely to work with you on budget and timeline. It will make the process more enjoyable overall, too, if you really click with your vendor.

3. PROJECT GOALS AND TARGET AUDIENCE

These two pieces of information are probably the most important pieces you can provide. This section tells your potential vendors whom they will be designing for and what the goals and objectives are for the project. It's important to include the specific pain points you are trying to solve and why your current solution isn't working.

Something you should also focus on is articulating the problem rather than describing a specific solution. You may not have the right solution to the problem (which is why you're tapping an expert). So describing the problem you hope to solve to the best of your ability will allow the experts to come up with more creative or appropriate solutions.

You should also outline specific outcomes you have in mind or goals you wish to accomplish. If there are quantitative metrics (better leads, high productivity rate, etc), describe those here.

4. SCOPE OF WORK AND DELIVERABLES

It's important that you are as clear as possible about what you want the project to include and the expectations you have for the work. This section of your RFP should be the most thorough (which means it's going to be the longest).

There are a lot of variables that will impact scope. The more detail you put into this section, the less back and forth you'll have to do once you choose a vendor. Hopefully the cost estimates you get back will be more accurate, too.

It's ok to not know exactly what's involved in development. What matters most is that you lay out in detail what you're expecting to be delivered. Some elements you may need that you may want to include upfront are:

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- Project management (do you plan to manage this project or expect the agency to handle it?)
- Content strategy
- Copywriting
- Front end design
- Front end coding
- Back end coding
- Testing and quality assurance
- Training your team to use the new app/software/website
- Support after launch
- Ongoing support
- Specific features (ecommerce, mobile responsiveness, etc.)
- Specific backend systems, data sources, APIs and/or feeds the mobile app/website/ software will be interfacing with
- Technical requirements or industry restraints (financial industry regulations, HIPPA compliance,etc.)
- Specific language you expect the coding to be in
- Membership management or password protection needs
- Accessibility needs (users with disabilities, larger font needs for elderly, etc.)
- The devices and operating systems are you selecting and why

5. PROJECT TIMELINE

It's important to convey the timeline you are looking at for the project to be completed in. Are there specific deadlines that need to be met? Is the launch of this project being timed with the launch of another product? Give timeline details now, so potential vendors know what kind of timeline you expect.

6. STRUCTURE OF THE VENDOR PROPOSALS

This part of your RFP tells vendors how you would like their proposals to be structured and what you expect in it to include. Is there a specific format you'd like them to follow? Do you want the final proposal as a Word Document, a PDF, a printed document, or some other format?

Adding thought and detail to this section will make it easier to compare the proposals you receive. When all the proposals follow the same format, you'll be able to compare vendors side by side more easily. (You'll also be able to see who follows directions.) Typically, a response format should include:

- Executive summary
- Background information
- Proposed services or deliverables
- Timeline and budget
- Portfolio of other work

In other words, the format should follow the outline or format of your own RFP, since the vendor should be answering each section. Here are some items and questions to consider including to ensure you are selecting the right agency:

- References from previous customers
- Beyond the portfolio, ask them to include 12 examples of similar projects they have worked on and what the outcomes were
- Explanation of their process (so you can see exactly how they work and what to expect, so you can determine if that works with how you work)
- List the current systems you work with and ask if they can work with those systems (legacy systems, data sources, backend systems, APIs, feeds, etc.). If they cannot, ask them to elaborate on what changes they suggest and why.
- Rundown of the team that will be working on the project (are they freelancers, fulltime employees, remote workers, overseas developers, etc.). Who will be completing the work? Who will you be interfacing with?
- Resumes of your lead designers (to give you an idea of the caliber of team you will be working with)
- Their measurements of success, analytics, or plan for ongoing improvement
- How the company differentiates itself over its competitors

7. BUDGET

It's important to set upfront expectations for budget. Even if you are guessing how much the project will cost, provide a budget or price range. You'd like to spend X but you definitely can't spend more than Y, having these numbers as target is much more helpful than an open budget.

For every project, there are needs and wants and a range of functions and features that could be left out or included. It all depends on budget and scope. This way, the vendors submitting proposals can help identify top priorities over nonessential elements.

8. SELECTION CRITERIA

This section gives you a chance to lay out clearly how you will be selecting the vendor for your project. Give this some thought and highlight your priorities, musthaves, nicetohaves, and the qualities that you value the most.

This will give the vendor a good guideline for what to showcase and save you time reading about things that won't affect your decision.

9. PROPOSAL TIMELINE

Finally, give a timeline for when you would like the proposals to be submitted and when you will be making your final decision.

Remember: What you put into a strong RFP is what you'll get out of it. All this writing and detail will yield better proposals in the end and better vendors for you to choose from. You will be able to weed out the bad apples more easily, get through more proposals, and find an agency that will deliver what you need, on time and within budget.

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