



# RFI & Vendor Beauty Parade

Covers basic concepts, guidance and more...

**A Reference for the Rest of Us!**

**elementsuite**  
Powerful. Smart. HR Software.

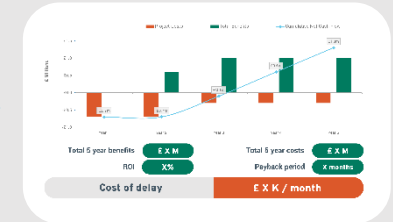




# From last time...

## A recap

In our previous sessions we've suggested that a Heatmap was a good way to provide structure and an objective basis for your initial "discovery" and "case for change". We also provided guidance on how to structure your business case, and provided some template.



## “So what next?”

Now that you've undertaken some analysis of your needs via your heatmapping, and started to construct your case for change internally via a formal business case, it's time to start thinking about running an RFI.

## “I hate acronyms - what's an RFI?”

As you'll notice from your Ninjas jargon buster, RFI stands for:

**REQUEST  
INFORMATION**

- ➔ An RFI (Request For Information) is a document you create and circulate to a list of target vendors asking them for a mini-proposal when you want to find out more.
- ➔ If you like the response(s) you get, the next step is to invite vendors to give you an initial demo. This is sometimes known as a vendor “beauty parade”.



# The RFI document – an overview

Let's do this... So it's time to start thinking about your RFI.

The key to writing an RFI document is to **make it really easy for the prospective vendor to understand**.

Like you, vendors are also busy, and it's worth sparing them a thought, as this is something they'll be doing "free of charge". They of course factor their time and costs into their delivery and license costs, but they do not expect to be paid for responding to an RFI, and have no guarantee of ever recovering this time investment. As such, in order to get the best out of them it's a good idea to keep the RFI as clear and concise as possible, and also align it as closely as possible to your needs.

At this stage **you don't need to give away too much information**, but an overview of your business, and some of the high-level drivers of your business case will help the vendors to understand whether their system is a good fit for your needs. The last thing you want is for a vendor to try and fit a poorly fitting solution to your poorly defined needs.

Being as clear as possible about what you're looking for, will save you and the vendor time.

## The typical components of an RFI are:

### Your company background

- Background about your company
- Where it is today - structure and org
- Future aspirations

### Project context

- Why you are doing your project
- Objectives & timelines
- Existing systems & known complexities

### Vendor company info

- Information about the vendor (e.g. size, turnover)
- About the company

### Fit to high level scope, time & cost

- High Level Areas you want the vendor to respond to
- Use heatmap?

### Fit to detailed scope

- Detailed listing of requirements you need
- Excel listing of things with "fit" rating

Information for vendor

Things you want the vendor to respond to



# Step 1 – Define your RFI template

## How to structure your RFI

In our experience, RFIs can usually be organised into the following sections:



### Company background

Describing your company, and its background / history is a surprisingly important part of the RFI. Vendors often have preferences regarding businesses, sectors & cultures that they prefer to work with. Spending time to describe your business may reap unexpected benefits.



### Where the company is today

An outline of the current status of the business. Nothing confidential required – but again may be used to convey growth plans that can be useful for suppliers to understand (e.g. your geographical and functional aspirations may not align with the vendor's aspirations). Also if there are known complexities in your business model, it's worth being as open as you can about these, as they will only come out in the process later.



### Background to project

The overview of why you're looking for a solution. Some of this can be summarised from your business case.



### Objectives of the project

Listing at a high level the 3-5 high level objectives helps the vendor not to get too lost in detail too early.



### Existing systems

Listing your existing systems may be useful as vendors may already have pre-built integrations or partnerships to consider.



### High level timescales

Give the vendor information about your proposed timescales, to ensure that if they were selected, they could meet these.



### Company & other information (for vendor to respond to)

Ask the vendor for other relevant information – e.g. registered company number and address, size, number of employees, presence in market, other companies they work with etc.



### High level scope (for vendor to respond to)

Provide a listing of the high level things you're looking for the system to achieve. These correlate to the boxes that you colour coded in your heatmapping exercise. Make sure from here on the document there is a clear response format (e.g. a spreadsheet is easier to manipulate responses than MSWord).



# Step 2 – High level scope

## Asking the vendor to respond to high level scope

A simple approach you might want to consider is to ask the vendors to rate the strength and alignment of their offering against your heatmap.

This is a useful method for immediately flushing out vendors who do not have a solution that is appropriate for your needs

This can take the form of an objective measure (e.g. asking the vendor to rate themselves on a 1-5 rating in Excel).

We would suggest asking the vendor to rate themselves on a 1 (Red) to 5 (Green) rating scale rather than a 3-point Red/Amber/Green scale as this will provide you with more granularity and context about the suitability of their solution to your needs.

HR Heatmap									
Recruitment	Training & Development	Performance Management	Person & Organisation	Employee Relations	Scheduling	Attendance & Absence	Compensation & Benefits	Manage Payroll	AI Productivity Assistant
Initiate vacancy	Design training	Set objectives / PDP	New starter	Grievance	Forecast demand	Time recording	Reward planning & management	Manage deductions	Content Generation
Apply	Plan training	Review performance	Assignments	Disciplinary	Workload modelling	Planned absence	Salary review	Manage payments	Document store / search
Screen applicants	Enrol on training	Manage talent	Movers	Appeals	Maintain availability	Unplanned absence	Manage benefits	Run payroll	Employee Assistant
Select candidate	Complete training	Succession planning	Leavers	Manage tribunals / compromise	Create schedule	Authorise payable time	Manage bonus incentives	Generate pay	Manager Assistant
Make offer	Manage training records	Promotions	Structure changes	Employee engagement	Maintain schedule	Manage long term absence	Manage pensions	Manage HMRC	HR Admin Assistant
Hire	Manage development programmes	Continuous feedback		Manage union relationships	Execution			Manage expenses	
On-board	Complete induction			Incident management				Run end of year	

elementsuite  
Powerful. Smart. All software.

HR Heatmap (Vendors to rate themselves: 1 to 5, 1= Low Capability - 5 = High capability)

Recruitment	Vendor to complete	Training & Development	Vendor to complete	Performance Management	Vendor to complete	Person & Organisation	Vendor to complete	Employee Relations	Vendor to complete	Scheduling	Vendor to complete	Attendance & Absence	Vendor to complete	Compensation & Benefits	Vendor to complete	Manage Payroll	Vendor to complete	AI Productivity Assistant	Vendor to complete
Initiate vacancy		Design training		Set objectives / PDP		New starter		Grievance		Forecast demand		Time recording		Reward planning & management		Manage deductions		Content Generation	
Apply		Plan training		Review performance		Assignments		Disciplinary		Workload modelling		Planned absence		Salary review		Manage payments		Document store / search	
Screen applicants		Enrol on training		Manage talent		Movers		Appeals		Maintain availability		Unplanned absence		Manage benefits		Run payroll		Employee Assistant	
Select candidate		Complete training		Succession planning		Leavers		Manage tribunals / compromise		Create schedule		Authorise payable time		Manage bonus incentives		Generate pay		Manager Assistant	
Make offer		Manage training records		Promotions		Structure changes		Employee engagement		Maintain schedule		Manage long term absence		Manage pensions		Manage HMRC		HR Admin Assistant	
Hire		Manage development programmes		Continuous feedback				Manage union relationships		Execution						Manage expenses			
On board		Complete induction						Incident management								Run end of year			



# Step 3 – Add in some specific requirements

How to define your listing of detailed scope requirements

Within the RFI you will probably want to define some lower level requirements that you wish your proposed vendors to respond to.

Don't list too many, as you want the vendor to remain interested, and you will always have the RFP (next stage) document to request more detail from the vendor. The key is to list the things that are most relevant to your project and business case.

In order to determine the detailed listing of requirements, you will need to track back your questions from the questionnaire. Alternatively, since these will be worded as questions, you'll need to convert these into system "requirements" or features.

RFI

TEMPLATE

MODIFY TO YOUR COMPANY BRANDING

PROJECT SCOPE		Vendor to complete	
Capability/Process	Definition	Software Ability Yes/No/Partial	Comments
Manage organisational charts	The ability to create an organisational chart showing an hierarchical link between employees and relevant information about each employee.		
Onboarding of new employees	The ability to capture all required HR data in relation to all personnel, including Right to Work, Bank Details etc. Include notifications relating to Right to Work expiry.		
Record/up-to-date HR records	The ability to record, update, view and report on employees personnel data and share this data with other relevant systems.		
Manage employee transfers	The ability to move employees and their associated costs between different business areas on both a temporary and permanent basis.		
Manage leavers	The ability to record an employees reasons for leaving, calculate any impact to their terms and conditions and then update other relevant systems.		
Manage changes to an employees job data/assignment	The ability to update, view and report on employees job data and share this data with other relevant systems. Cater for multiple job roles and view historical assignment changes quickly and easily.		
Unplanned absence management e.g. sickness	The ability to update, view and report on employees job data and share this data with other relevant systems.		
Planned absence management e.g. holiday	The ability to set planned absence payment entitlements (including statutory payments), link those entitlements to employees, record when an employee has an planned absence and the reason, manage their payment entitlement and create, issue and record documentation relating to planned absence management.		
Disciplinary management	The ability to create, issue and record documentation relating to disciplinary management.		
Grievance management	The ability to create, issue and record documentation relating to grievance management.		
Self service functionality	The ability for employees and managers to access specific parts of the systems' functionality/data and make/respond to requests and amend data.		
Workflow functionality	The ability for the system to automate tasks based on specific actions carried out by users and for notifications to highlight specific actions required.		
Reporting	The ability to report on HR data held within the system.		
Payroll system interface	The ability to send and receive information to/from the existing payroll system		
Finance interface	The ability to send across org hierarchy, costs, and employee details to the existing Finance system		
Single Sign-on	Integration required with Active Directory		



# Step 4 – Publishing your RFI

## Things to check before sending out

### Quality check

Before publishing your RFP, you should ensure that it has been reviewed extensively by a number of people in your organisation.

The last thing you want after all this work, is for typos or other mistakes in the RFI / RFP process to lead to reciprocal bad behaviours by your prospective vendors, and a lack of confidence in your process and controls. Take care, and check it over many times before sending!

### Internal approvals

You should also ensure that the appropriate approvals have been sought by your governance and senior stakeholders. You are asking vendors to commit their time and endeavours to a process and it is critical to garner their trust in order to get the best from them. Make sure that appropriate budget and approvals are secured before submitting. If internal approvals are not in place, your vendors will lose confidence in your process, and you may not be given a second chance.

### Covering email

When sending the RFP, make sure that it is sent with an appropriate covering email outlining the process for responding to the RFP, and ensure you are crystal clear about the timelines and process for submitting the responses – e.g. to a specified email address by a certain time. It may be worth asking the vendors to email back to confirm receipt in case of email errors or nuances. Remember to spell check the email before you send it!

### Typical timelines for response

The timelines for response will of course depend on your circumstances, but in order to get the best from the vendors, it's a good idea to give them realistic timescales for their response that also factor into account holiday seasons (avoiding summer and Christmas if possible). Vendors typically expect to be given between 2-3 weeks to respond to an RFI from the date of issue through to the response deadline. Any less than 2 weeks, and you risk a poor / inadequately rushed response. Any more than 4 weeks, and the vendor may consider that the process doesn't have the necessary momentum and is therefore too risky to invest time and energy in responding to.

### Late submissions or requests for extension

It is worth considering in advance how you will respond to late submissions or requests for extension. If you wish to take a militant stance (as most vendors would expect) it is worth pointing this out in your covering email.



# Step 5 – Reviewing the RFI responses

## Reviewing the responses

Once you have all your responses, you will need to review them and decide which of the vendors are most suited to your requirements, and therefore should be invited to demo, where you can more closely interrogate them and understand the system fit.

There aren't really any hard-and-fast guidelines to follow when reviewing RFI responses – your decisions will be guided by common sense, but some things to consider are outlined below:

### Stay objective – head over heart

Generally it's a good idea to let your head rule your heart, and your procurement/finance teams will usually insist on there being an objective and auditable framework by which the decision making process is taking place. This means a considerable amount of "spreadsheet fun and joy", as you convert answers into points scoring, to ascertain the relative positions of the vendor responses.

### Make a formal summary of the responses, scoring process, and outcomes

It's critical that the process is fair, objective and auditable, and it's absolutely critical that the integrity of you and your process is not compromised.

In order to achieve this, it's a good idea to formalise a summary of the responses and the scoring into a document that is circulated for approval.

### But heart is also important

However, there are times where the objectivity of the RFI process can be manoeuvred within acceptable boundaries, by judicious use of "weighting" of responses – either because of the importance or priority of the factor or requirement being measured.

If using weighting to adjust scoring response, be clear about what you're doing and ensure that the reasons and respective weighting framework is documented and validated / approved by your stakeholders. A basic example of a weighted scorecard is provided .

### Inviting vendors to demo

When you've finished reviewing all the responses, with appropriate scoring and weighted scoring where appropriate, you will ascertain which of the vendors have scored most highly, and so should be invited to demo. It's critically important that your stakeholders are involved and 100% back the integrity of your process and the resulting decisions made from the process.



# Step 6 – Inviting vendors to demo

## Inviting vendors to your Beauty Parade



Once you have decided which of your vendors to invite to demo, you should ensure that you have approvals to proceed.

At this point you should notify the successful vendors and book in dates for them to present their solutions.

Vendors at this point are likely to be over the moon to be demonstrating and it's important to keep them aligned with your objectives, and for them not to drift into a “standard” or generic demo that is not tuned to your needs.

Occasionally, they may also try and use the demo to steer attention from key areas of your required functionality.

To prevent this and in order for the demo to be most effective it's a good idea to construct circa 5 **“day in the life of scenarios” that are specific to your business**, and which showcase the suitability of the system to your operational needs.

This ensures that the system is demonstrated from the perspective of the users (sometimes called weirdly, “actors”!) themselves, rather than the vendor trying to demonstrate flashy system features that don't have operational relevance.



# Make sure you score the Beauty Parades (!)

Use your high level requirements and your 'day in the life of' to score each vendor against your criteria

Capability:	Definition of the capability:	Mid level Requirement within each capability:	Response	Low level Requirements within each mid-level requirement.	Response
Manage organisational charts	The ability to generate an organisational chart showing the hierarchical link between employees and relevant information about each employee.	User inputs data to system			
		User navigates and searches organisational chart on system			
		User extracts data from system			
Onboarding of new employees	The ability to capture all required HR data in relation to all personnel, including Right to Work, Bank Details etc. Include notifications relating to Right to Work expiry.	Ability to configure the system to capture data within the onboarding process			
		Ability to capture Right to Work			
		Ability for new employees to sign a copy of their contract through e-signature			
Record/ update HR records	The ability to record, update, view and report on employees personal data and share this data with other relevant systems.	System can maintain a list of employees with user defined fields containing relevant personal data		System has the concept of 'Benefit Bands' where each band is linked to different terms and conditions e.g. holiday entitlement	
		System regularly reports missing data		System can prompt users to update their information regularly	
		User (updater) submits update to the system		System has an audit trail in place so we can always see who made the changes	
		User (approver) approves update for user defined change types e.g. a name change		Users can define which fields require approval following a change and which do not	
		System updates employee HR record			
		System feeds data to payroll system		System has the concept of a clear cut off point with regards to which week changes take effect	
		User interrogates system to view data held on employees			
Manage employee transfers	The ability to move employees and their associated costs between different business areas on both a temporary and permanent basis.	User (requestor) submits transfer request on system		System provides an electronic way to manage changes which includes stores/office areas, hours, job codes, additional payments and the start/end dates of any transfers	
		User (approver) reviews transfer request on system			
		User (approver) responds to transfer request on system		System can automatically identify an approver based on organisational structure and roles	



elementsuite.com