Company’s Name

# REQUEST FOR PROPOSAL

*Disclaimer - This is intended as an outline of a Request for Proposal (RFP) and does not represent a complete RFP. Companies should consult their procurement and legal departments for advice on their internal RFP process, procedures and documentation.*

<COMPANY LOGO>

<COMPANY NAME>

<DEPARTMENT>

<COMPANY ADDRESS>

INSERT FINAL TABLE OF CONTENTS

Section 1: Introduction and Overview

1.1 Request for Proposal Overview

Enter company standard RFP Introduction and overview text

1.2 Schedule of Events

All Deadlines are on 00:00 PM (GMT + / -)

*Example:*

|  |  |
| --- | --- |
| *Event* | *Date* |
| *RFP released to solution provider* | *INSERT DATE* |
| *Solution provider questions submitted* | *INSERT DATE* |
| *Solution provider questions answered* | *INSERT DATE* |
| *RFP response deadline* | *INSERT DATE* |
| *Solution provider demonstrations* | *INSERT DATE* |
| *Solution provider selection* | *INSERT DATE* |
| *Contract finalized* | *INSERT DATE* |

1.3 Submission of Proposal

Provide detailed information regarding where and when the proposal should be submitted.

*Example*

*<COMPANY NAME> requests that you submit your response no later than <DATE>.*

*If you have any questions or concerns, please contact <COMPANY REPRESENTATIVE> directly via email following instructions in Appendix C. Please do not attempt to contact anyone else.*

*We look forward to your response.*

*<PROJECT MANAGER NAME>*

*<COMPANY DEPARTMENT>*

*<COMPANY NAME>*

*<COMPANY ADDRESS>*

1.4 Company Bio

Provide a brief company bio here, including industry, geography and lines of business.

1.5 Evaluation Criteria

Provide information on how the evaluation of solution providers will occur.

*Example:*

*The selected solution provider must be able to meet the minimum general, functional and technical requirements outlined in this RFP. A selection team has been created and charged with making the final vendor selection. Results from the RFP process will determine solution providers identified to participate in further system demonstrations.*

*In general, proposals will be graded on the following criteria.*

*Examples:*

* *Usability / ease of use*
* *System capabilities*
* *Solution provider partnership*
* *Global capabildities*
* *Support and Service*
* *Pricing / total cost of ownership*

1.6 Response to Proposal

The RFP requires solution provider responses in the sections listed below. Please follow all guidelines provided.

* **Section 4.1 Systems Use and Talent Integration Requirements**
* Section 4.2 Detailed Functional Requirements
* **Section 5**.3 Technical Requirements
* Section 5.4 Service Level Agreements
* **Section 6.1 Solution Description**
* **Section 6.2 Implementation and Transition**
* Sections 7.1 – 7.3 Solution Pricing

Section 2: Project Objectives

2.1 Project Objectives

Provide an overview of talent management systems objectives.

*Example Objectives:*

* *Provides a true partnership in assisting <COMPANY NAME> in making future Talent Management System modification decisions and staying current on Talent Management System technologies.*
* *Provides thought leadership in talent management and related systems.*
* *Is responsive and provides excellent support levels to meet our global organizational requirements.*

2.2 Current Solution

Add a description of talent management systems and processes currently in place.

2.3 Talent Management Vision and Strategy

Describe the company vision and strategy of talent management, including approach, goals and automation requirements. Outline the talent management strategy roadmap and critical talent initiatives. Include any internal models to help the solution provider understand your integrated talent management strategy and plan. Include any critical roles or talent pools on which the organization is focusing its current talent investments.

*Example: <COMPANY NAME> has developed a comprehensive talent management strategy centering on performance management and talent development for organizational leaders and high-potential employees in critical business segments. The proposed automated approach will support the ability to view, plan and leverage talent across the organization, and enable the development of a ready-now leadership pipeline to meet future organizational growth. In addition, <COMPANY NAME> is looking to improve the talent development process for employees in critical roles to include increased integration between development activities and performance improvement planning. These roles include nurses, pharmacists, technicians and mid-level managers.*

Provide any company-specific strategic talent management strategy framework or roadmap that describes the organization’s vision of talent management and linkage to business objectives.

Section 3: General Requirements

3.1 General Requirements

Provide information on general system requirements, and include system goals and expectations. This would include high-level, “big rock” requirements identified during the talent strategy development.

*Examples:*

* *Usability requirements*
* *Architecture*
* *Delivery model*
* *Process improvement expectations*
* *Expected operational efficiency gains*
* *Number and types of users*
* *Improved talent data reporting and analytics*
* *Utilization expectations*
* *Domain, sub-domain or external user requirements*

List the required functional talent areas identified through the Talent Management Functional Requirements assessment that are required (i.e., learning and performance management), as well as any future or optional functional areas (i.e., compensation) to address.

Attach any detailed functional workflows or forms and list in Appendix A:

*Workflow Examples:*

* *Performance review process*
* *Succession planning grids/process*
* *Industry certification/licensing process*

Section 4: Functionality and Solutions

Provide a detailed written response in the spaces below to the following functional requirements.

4.1. Systems Use and Talent Integration Requirements

**Copy and paste any integration requirements captured in the** *Systems Use and Talent Integration Worksheet* **contained in the *Bersin & Associates Talent Management Systems RFP Executive Summary* document. This is an opportunity to explain the overall integrated use of each module unique to the organization.**

|  |  |  |
| --- | --- | --- |
| **Talent Management Functional Area** | **Overview of Systems Use and Integration Requirements** | **Solution Provider Capability** (Describe capability and indicate current level of solution – comprehensive, basic, not available) |
| *Example: Competency Management* | Provide a means to store competencies and build competency models linked to job descriptions. Allow uploading of Lominger competency models and modify based on business-unit needs. Be able to link competencies to learning activities in the LMS, so that individual development plan activity is automatically generated following a competency assessment. Enable multirater competency assessments. Utilize competencies in behavioral interviewing forms. |  |
| *Example: Performance Management* | The system should allow for annual and biannual performance review cycles, with multiple rating scales. Both goals and competencies are included in the performance appraisal. Performance appraisals should pull competency models from the job description for each job. Conduct complex calculations to arrive at a total performance rating based on job-specific key results areas (KRAs). Provide a compensation planning worksheet for merit pay planning (optional / future) and link performance rating to the compensation planning worksheet. |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

4.2 Detailed Functional Requirements

**The prioritized functional requirements found in Appendix B provide a detailed list of <COMPANY NAME>’s critical functional requirements. Utilize the *Bersin & Associates Talent Management Systems Functional Requirements* to identify the system functionality required and their priority levels.**

**Solutions providers should complete the attachment in Excel format in Appendix B and submit with final proposal.**

Section 5: Technical and Support Requirements

5.1 Current Technology Solutions:

*Examples:*

* *Replacing its existing LMS (solution) at the end of a five-year cycle licensed and hosted through a third-party solution provider.*
* *Performance management is a home-grown solution that is too difficult to support and develop to meet current and future requirements.*
* *Job descriptions are developed using MS Word, with all competencies maintained in an MS Access database.*
* *There is no current succession management system in place.*

5.2 Future Technology Requirements Overview:

Provide detailed technology and data expectations, including future expectations such as mergers or external users.

*Examples:*

* *Anticipate using an on-demand / Software as a Service (SaaS) solution.*
* *An employee and organization data feed from PeopleSoft HRMS is required.*
* *All organizational hierarchy data is required within the new system.*
* *Incorporating social software / networking tools.*
* *A solution for building external supplier domains is required, as well as controlling access to the system.*
* *Future data interfaces from other HRMS systems are likely due to anticipated acquisitions.*

5.3 Technology Requirements

*Examples:*

*List technology requirements / questions in matrix provided below.*

* *Technical architecture model*
* *Hosting environment with diagram and server locations*
* *SAS70 Certification*
* *Safe Harbor and data privacy resolution*
* *Security model and authentication*
* *Physical security and personnel checks for hosting environments*
* *System uptime and ability to meet client SLAs*
* *Disaster recovery plan and standard outage schedule*
* *Support escalation process*
* *Release schedules and process*
* *Backup and restore management*

|  |  |
| --- | --- |
| *<COMPANY NAME> Technology Requirement* | Solution provider capability or solution |
|  |  |

5.4 Service Level Agreements

Provide a list of expected service level agreements.

*Examples:*

* *Resolve problem calls within specified SLA*
* *Communicate to all affected parties, actions to be taken to resolve problems prior to taking them*
* *Initiate service calls with software vendors when appropriate to solve problems*
* *Notify <COMPANY NAME> when opening service calls with vendors and keep <COMPANY NAME> apprised of status*
* *Determine and document root cause of issues per <COMPANY NAME> standard processes*
* *Analyze service call trends quarterly and recommend changes to reduce those calls in the future*

Provide company’s service level expectations.

|  |  |  |  |
| --- | --- | --- | --- |
| Service Level | Expected | Business Rule | Solution Provider Response |
| Availability of Production Application | % | Percent Scheduled Available Time |  |
| Response to Severity One Issue | % | Minutes |  |
| Resolution of Severity One Issue | % | Hours |  |
| Response to Severity Two Issue | % | Hours |  |
| Resolution to Severity Two Issue | % | Days |  |
| Response to Severity Three Issue | % | Day(s) |  |
| Resolution to Severity Three Issue | % | Days |  |
| On-Time Completion of Service (change) Requests | % | Contracted |  |

Section 6: Solution

6.1 Solution Description

Solution provider should, at a high-level, describe the software solution recommended for use by <COMPANY NAME> and specify why the proposed solution is particularly suitable for <COMPANY NAME>.

6.2 Implementation and Transition

Solution provider should describe its implementation planning process, provide bios of individuals supporting the implementation, as well as how the specific implementation would occur for <COMPANY NAME>, including any phased implementation, transition with other software vendors and data migration.

Response:

Section 7: Solution Pricing

Provide a pricing template for solution provider to complete.

*Example:*

7.1 Operating Costs:

*Shown as Cost / User**(Include licensing fees, upgrade costs, customizations, additional feeds, etc.)*

*Example:*

| *#* | *Functionality / Employees* | *15000*  *Year 1* | *40,000*  *Years 2-5* | *9000 Suppliers Years 3- 5* |
| --- | --- | --- | --- | --- |
| *1* | *Performance Management (Required)* |  |  | *X* |
| *2* | *Job Profiles (Required)* |  |  | *X* |
| *3* | *Competency Management (Required)* |  |  | *X* |
| *4* | *Learning Management (Required)* |  |  |  |
| *5* | *Compensation Planning / Merit Pay (Optional)* |  |  | *X* |
| *6* | *Succession Management (Optional)* |  |  | *X* |
| *7* | *Anticipated Customizations (Identified in Functional Requirements section of RFP)* |  |  |  |
| *8* | *Language Packs (German, Spanish, French, U.K. English, Swedish estimated at 20,000 users)* | *X* |  |  |

7.2 Implementation Costs:

*Example:*

|  |  |  |
| --- | --- | --- |
| *Unit Type:*  *(itemize by unit type)* | *Description* | *Cost* |
| *Consulting fees* |  |  |
| *Data Integration:* | *Nightly employee data feed with organizational hierarchy from HRMS* |  |
| *Data Integration:* | *Historical data transfer from LMS* |  |
| *Single Sign-on* |  |  |

7.3 Total Costs of Ownership:

*Operating and Implementation (show as total dollar amount)*

*Example:*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *Total Cost / Year* | *1* | *2* | *3* | *4* | *5* | *Total Cost* |
| *Required Functionality Plus Compensation and Succession* |  |  |  |  |  |  |
| *Required Functionality plus Compensation Only* |  |  |  |  |  |  |
| *Required Functionality Plus Succession Only* |  |  |  |  |  |  |

Section 8: Terms and Conditions

Provide company’s standard contract Terms and Conditions.

Section 9: Appendices

9.1 Appendix A: Process Documentation and Reference Files (included with this RFP)

The following is an explanation of the files included in this RFP package you have received.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Section | Type | Description | Action Required |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

9.2 Appendix B: Prioritized Functional Requirements

Complete the detailed functional requirements for each talent area. Attach the Prioritized Functional Requirements Excel Spreadsheet contained in the *Bersin & Associates Talent Management Systems Functional Requirements document.*

9.3 Appendix C: Email Intent to Respond Template

The “Intent to Respond” email text can be found below. Please copy / paste this text into the reply email and remove one of the two (“will” / ”will not”) statements to reflect your response:

|  |  |
| --- | --- |
| To: | Project Manager email address |
| From: |  |
| Subject: | Talent Management System – Intent to Respond |
| As requested, below is our organization’s response to <COMPANY’S NAME> RFP.  \_\_\_ We **WILL** respond to this RFP by the deadline specified in the RFP.  \_\_\_ We **WILL NOT** respond to this RFP and will return all materials received.  Information exchanged in connection with this RFP, including the information disclosed in this RFP, **[and the existence of this RFP]** will be governed by the nondisclosure agreement dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. | |

9.4 Appendix D: Email Supplier Questions Template

Use the following format to submit questions on the RFP and indicate the section of the RFP that relates to the question, if applicable. **EMAIL** the questions to <PROJECT MANAGER NAME>@<COMPANY>.com before <DATE>. All significant questions will be answered and shared with all suppliers who have indicated their intent to respond to this RFP.

|  |  |
| --- | --- |
| To: | Project Manager email address |
| From: |  |
| Subject: | Talent Management Systems RFP – Supplier Questions |
| Question(s)/Section Reference:  Note to Supplier: Please reference the section of the RFP that the question pertains to. If multiple questions, please number them. | |

9.5 Appendix E: References

Please provide up to four references of production clients with which you have worked on talent profiles, performance management and succession management systems within the past two years.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Reference #1 | Reference #2 | Reference #3 | Reference #4 |
| Contact Name |  |  |  |  |
| Company Name |  |  |  |  |
| Address |  |  |  |  |
| Industry |  |  |  |  |
| Telephone Number (country/area code) |  |  |  |  |
| Product version # |  |  |  |  |
| # of years as a performance and learning management customer |  |  |  |  |
| Brief description of implementation number / size / type / locations / software version and resources committed, etc. |  |  |  |  |
| Is a site visit with this client possible? |  |  |  |  |