

# Next Practices in Scope of Work Development

Procurement Month Training Event



So how do we attract more  
High-Performing Vendors?

**Starts With  
Your  
Solicitation!**

**RFP**

**Request for Proposal**



**Information Technology (IT)  
Software Implementation Template**

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY



# RFP vs. SOW: How are they Related?

# RFP

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# RFP vs. SOW: How are they Related?

## RFP

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1 Statement of Work

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

5 Administrative Requirements

6 Proposal Forms

7 Attachments & Exhibits

# Organizing a High-Performing RFP

## RFP

Request for Proposal



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What the Client  
is Purchasing

# Organizing a High-Performing RFP

## RFP

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1 Statement of Work

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What the Client  
is Purchasing

How the Client will  
Evaluate and Select  
the vendor

# DEFINITION: Statement of Work (SOW)

- The Statement of Work (SOW) is an essential part of any solicitation.
- Describes what you are looking to purchase, acquire, or achieve.



# Terminology

## All are Included...

- **Statement of Work (SOW)**
- **Scope of Work (SOW)**
- **Specifications or Minimum Specifications**
- **Requirements or Minimum Requirements**
  - Business Requirements
  - Technical Requirements
  - Functional Requirements
- **Minimum Qualifications**

**SOW =  
What you are  
Hiring the  
Vendor to do**

# AI

**What do you know about AI?**

**Has anyone used the tools? Which one(s) did you use?**

# AI is going to be (already is?) disruptive

MARKETS BUSINESS INVESTING TECH POLITICS CNBC TV INVESTING CLUB & PRO

PERSONAL FINANCE

## A.I. is on a collision course with white-collar, high-paid jobs — and with unknown impact

PUBLISHED MON, JUL 31 2023, 7:00 AM EDT

BUSINESS | FINANCE | TECH | MEDIA | LIFESTYLE | ARTS | E

BUSINESS

## Two-Thirds of Jobs Are at Risk: Goldman Sachs A.I. Study

Bank's economists estimate that 46% of administrative positions, 37% of engineering jobs could be replaced by artificial

Forbes

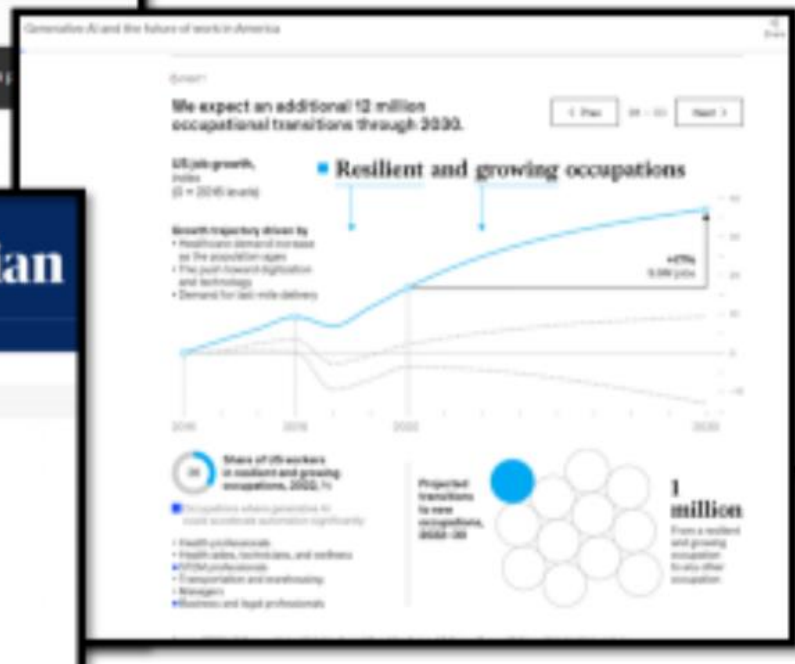
ENTERPRISE TECH

## Half Of All Skills Will Be Outdated Within Two Years, Study Suggests

Joe McKendrick Senior Contributor

ADVERTISEMENT

Microsoft 90-day return



Guardian

AI having 'positive impact' on UK jobs but could increase regional inequalities, says report

Study finds new technologies have created and upskilled jobs but disparities in education and investment may affect pace of change

# The “Uncanny Valley”



# The “Uncanny Valley”



# Practical Uses

## 1. Flesh out an idea

**“Write a paragraph that explains why our procurement team needs additional training. Some ideas:**

- \* can't get current RFPs done**
- \* internal response time is too long**
- \* too many protests”**

# Practical Uses, cont'd

## 2. Assist in writing a Scope of Work

**“Put together a draft scope for a 100,000SF government facility, that has offices, meetings rooms, and cubicles.”**

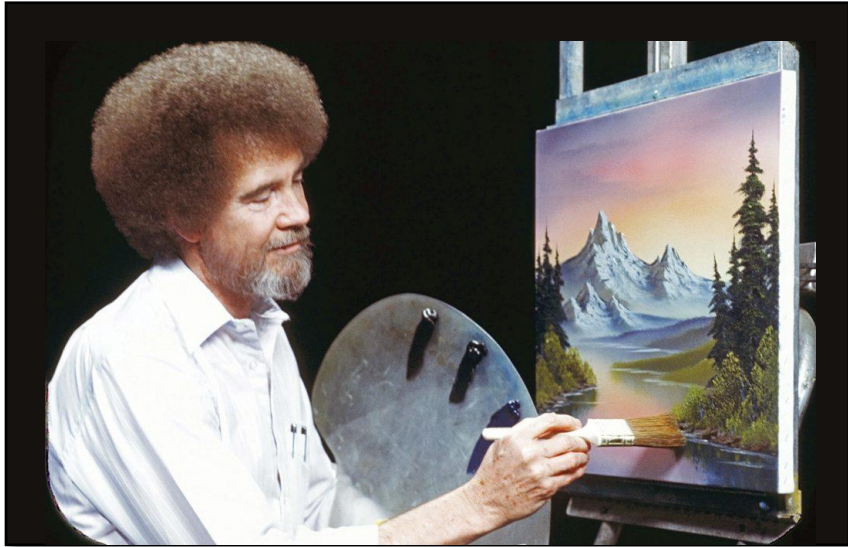
# Practical Uses, cont'd

## 3. Address a difficult situation

**“Draft a letter of notice of successful bid for a vendor on a school furniture contract.”**



# The Goal of the SOW



- **Paint the picture of what success looks like**
- **Describe what it will take to make you 100% satisfied (what are the outcomes & achievements)**
- **A good SOW assures that all of the vendors propose a proper solution (that meets your needs)**

A hand in a dark suit sleeve holds a car key with a black fob and a silver metal key. The background is a blurred image of a car, possibly a red one, with a blue overlay. The text 'Workshop' is written in yellow, and 'Purchasing a Vehicle' is written in white below it.

Workshop

Purchasing a Vehicle

# Turn to the "SOW Workshop" Tab of your Handbook

### SOW Workshop Form

**TEAM MEMBERS:**

**VEHICLES:**

|        | #  | MAKE    | PRICE     |       | #  | MAKE     | PRICE    |
|--------|----|---------|-----------|-------|----|----------|----------|
| SEDAN  | 1  | Kia     | \$14,000  | TRUCK | 13 | Toyota   | \$18,000 |
|        | 2  | Honda   | \$16,000  |       | 14 | Dodge    | \$22,000 |
|        | 3  | Ford    | \$21,000  |       | 15 | Ford     | \$15,000 |
|        | 4  | Chevy   | \$23,000  |       | 16 | Chevy    | \$28,000 |
| SUV    | 5  | Honda   | \$19,000  | VAN   | 17 | Kia      | \$22,000 |
|        | 6  | Toyota  | \$29,000  |       | 18 | Dodge    | \$24,000 |
|        | 7  | Dodge   | \$29,000  |       | 19 | Chrysler | \$25,000 |
|        | 8  | Chevy   | \$38,000  |       | 20 | Honda    | \$35,000 |
| LUXURY | 9  | Audi    | \$35,000  |       |    |          |          |
|        | 10 | BMW     | \$60,000  |       |    |          |          |
|        | 11 | Porsche | \$105,000 |       |    |          |          |
|        | 12 | Ferrari | \$125,000 |       |    |          |          |

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**FEEDBACK:**

|   | SCENARIO #1 | SCENARIO #2 | SCENARIO #3 | SCENARIO #4 | SCENARIO #5 | SCENARIO #6 | SCENARIO #7 |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Vehicles Selected (#):  |             |             |             |             |             |             |             |
| Level of Satisfaction with requirements (1-10)<br><small>(10 = Extremely Satisfied &amp; 1 = Extremely Dissatisfied):</small> |             |             |             |             |             |             |             |

**SCENARIO #8**

|   |  |
|---|--|
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

| CATEGORY | MAKE | TYPE     | MILEAGE | COLOR  |                                     |                                     |                                     | SEATS                               | OPTIONS       |                                     |                                     | SAFETY                              | MSRP    |           |
|----------|------|----------|---------|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------|-------------------------------------|-------------------------------------|-------------------------------------|---------|-----------|
|          |      |          |         | W      | B                                   | R                                   | S                                   |                                     | BACKUP CAMERA | REMOVABLE SEATS                     | TOW PACKAGE                         |                                     |         |           |
|          |      |          |         |        |                                     |                                     |                                     |                                     |               |                                     |                                     |                                     |         |           |
| SEDAN    | 1    | Kia      | Used    | 59,000 |                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | 4             |                                     |                                     |                                     | 5 Stars | \$14,000  |
|          | 2    | Honda    | Used    | 66,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4             |                                     |                                     |                                     | 5 Stars | \$16,000  |
|          | 3    | Ford     | New     | 11     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4             |                                     |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$21,000  |
|          | 4    | Chevy    | New     | 13     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4             | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars | \$23,000  |
| SUV      | 5    | Honda    | Used    | 39,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$19,000  |
|          | 6    | Toyota   | New     | 8      |                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | 5             | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$29,000  |
|          | 7    | Dodge    | New     | 12     | <input checked="" type="checkbox"/> |                                     |                                     | <input checked="" type="checkbox"/> | 7             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$29,000  |
|          | 8    | Chevy    | New     | 6      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 7             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$38,000  |
| LUXURY   | 9    | Audi     | New     | 11     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$35,000  |
|          | 10   | BMW      | New     | 12     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | 5 Stars | \$60,000  |
|          | 11   | Porsche  | New     | 7      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | 2             |                                     |                                     |                                     | 5 Stars | \$105,000 |
|          | 12   | Ferrari  | New     | 2      |                                     |                                     | <input checked="" type="checkbox"/> |                                     | 2             |                                     |                                     |                                     | 5 Stars | \$125,000 |
| TRUCK    | 13   | Toyota   | Used    | 74,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 3             | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$18,000  |
|          | 14   | Dodge    | New     | 11     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5             | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$22,000  |
|          | 15   | Ford     | Used    | 98,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5             |                                     |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$15,000  |
|          | 16   | Chevy    | New     | 24     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5             | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$28,000  |
| VAN      | 17   | Kia      | Used    | 47,000 | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> |                                     | 7             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$22,000  |
|          | 18   | Dodge    | New     | 23     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7             | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars | \$24,000  |
|          | 19   | Chrysler | New     | 17     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$25,000  |
|          | 20   | Honda    | New     | 19     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 7             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$35,000  |

W = White | B = Black | R = Red | S = Silver

# Summary of Objectives

- You will play the role of a **salesperson** for a Car Dealership.
- Your task will be to identify the **'best' vehicle** for a customer based on your current inventory of vehicles.



# Workshop Form

|  | SCENARIO #1 | SCENARIO #2 | SCENARIO #3 | SCENARIO #4 | SCENARIO #5 | SCENARIO #6 | SCENARIO #7 |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Vehicles Selected (#):   |             |             |             |             |             |             |             |
| Level of Satisfaction with requirements (1-10)<br>(10 = Extremely Satisfied & 1 = Extremely Dissatisfied): |             |             |             |             |             |             |             |

**SCENARIO #8**

|   |  |
|---|--|
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

### Evaluation Form

TEAM MEMBERS:

VEHICLES:

| Category | ID | Brand    | Price     |
|----------|----|----------|-----------|
| SEDAN    | 1  | Kia      | \$14,000  |
|          | 2  | Honda    | \$16,000  |
|          | 3  | Ford     | \$21,000  |
|          | 4  | Chevy    | \$23,000  |
| TRUCK    | 13 | Toyota   | \$18,000  |
|          | 14 | Dodge    | \$22,000  |
|          | 15 | Ford     | \$15,000  |
|          | 16 | Chevy    | \$28,000  |
| SUV      | 5  | Honda    | \$19,000  |
|          | 6  | Toyota   | \$29,000  |
|          | 7  | Dodge    | \$29,000  |
|          | 8  | Chevy    | \$38,000  |
| VAN      | 17 | Kia      | \$22,000  |
|          | 18 | Dodge    | \$24,000  |
|          | 19 | Chrysler | \$25,000  |
|          | 20 | Honda    | \$35,000  |
| LUXURY   | 9  | Audi     | \$35,000  |
|          | 10 | BMW      | \$60,000  |
|          | 11 | Porsche  | \$105,000 |
|          | 12 | Ferrari  | \$125,000 |

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FEEDBACK:

|  | SCENARIO #1 | SCENARIO #2 | SCENARIO #3 | SCENARIO #4 | SCENARIO #5 | SCENARIO #6 | SCENARIO #7 |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Vehicles Selected (#):   |             |             |             |             |             |             |             |
| Level of Satisfaction with requirements (1-10)<br>(10 = Extremely Satisfied & 1 = Extremely Dissatisfied): |             |             |             |             |             |             |             |

**SCENARIO #8**

|   |  |
|---|--|
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |



# SCENARIO #1

- I need to purchase a vehicle.
- What is the best deal that you can offer me?
- I will be back at the end of the week to purchase the vehicle!

# **OBJECTIVE:** Identify the vehicle you selected for this customer

## Scenario #1:

- I need to purchase a vehicle.
- What is the best deal that you can offer me?
- I will be back at the end of the week to purchase the vehicle?

Vehicles Selected (#):

Level of satisfaction with stated requirements (1-10)

(10 = Extremely Satisfied & 1 = Extremely Dissatisfied):

|             |  |
|-------------|--|
| SCENARIO #1 |  |
|             |  |
|             |  |

| CATEGORY | MAKE    | TYPE     | MILEAGE | COLOR                    |                          |                          | SEATS                    | OPTIONS                  |                          |                          | SAFETY                   | MSRP      |             |
|----------|---------|----------|---------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-----------|-------------|
|          |         |          |         | W                        | B                        | R                        |                          | S                        | BACKUP CAMERA            | REMOVABLE SEATS          |                          |           | TOW PACKAGE |
| SEDAN    | 1       | Kia      | Used    | 55,000                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 4                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$14,000    |
|          | 2       | Honda    | Used    | 60,000                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 4                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$18,000    |
|          | 3       | Ford     | New     | 11                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 4                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$21,000    |
|          | 4       | Chevy    | New     | 13                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 4                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$23,000    |
| SUV      | 5       | Honda    | Used    | 39,000                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$19,000    |
|          | 6       | Toyota   | New     | 8                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$29,000    |
|          | 7       | Dodge    | New     | 12                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 7                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$29,000    |
|          | 8       | Chevy    | New     | 6                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 7                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$38,000    |
| LUXURY   | 9       | Audi     | New     | 11                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 4                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$35,000    |
|          | 10      | BMW      | New     | 12                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 4                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$60,000    |
|          | 11      | Porsche  | New     | 7                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 2                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$105,000   |
| 12       | Ferrari | New      | 2       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 2                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars                  | \$125,000 |             |
| TRUCK    | 13      | Toyota   | Used    | 74,000                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 3                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$18,000    |
|          | 14      | Dodge    | New     | 11                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$22,000    |
|          | 15      | Ford     | Used    | 98,000                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$15,000    |
|          | 16      | Chevy    | New     | 24                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$28,000    |
| VAN      | 17      | Kia      | Used    | 47,000                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 7                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$22,000    |
|          | 18      | Dodge    | New     | 23                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 7                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$24,000    |
|          | 19      | Chrysler | New     | 17                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 7                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$25,000    |
|          | 20      | Honda    | New     | 19                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 7                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 5 Stars   | \$35,000    |

# ***POLL RESULTS***





# Most Common Feedback...

- *What does “best-deal” even mean?*
- *Open-ended SOW = free for fall, price-gauging, etc.*
- *Some teams will pick most expensive option / Others pick the cheapest*
- *Many teams are frustrated and annoyed and didn't really spend much effort?*

# Clarify Assumptions...

- The Salesperson can only offer **1 vehicle**  
(**cannot** offer multiple options)
- The Salesperson really wants to make the deal
  - (**would rather not 'lose' the deal** or see client purchase a vehicle from the dealer across the street)

# SCENARIO #2

- Here are my expectations:
  - Need a new vehicle, not used
  - Need 5-star safety rating
  - Would like it to be black or silver
  - Would like Back-Up Camera
  - Probably an SUV (3 kids plus 2 adults)

| CATEGORY | MAKE | TYPE     | MILEAGE | COLOR  |                                     |                                     |                                     | SEATS | OPTIONS                             |                                     |                                     | SAFETY  | MSRP      |
|----------|------|----------|---------|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------|-------------------------------------|-------------------------------------|-------------------------------------|---------|-----------|
|          |      |          |         | W      | B                                   | R                                   | S                                   |       | BACKUP CAMERA                       | REMOVABLE SEATS                     | TOW PACKAGE                         |         |           |
| SEDAN    | 1    | Kia      | Used    | 59,000 | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     |                                     |                                     |                                     | 5 Stars | \$14,000  |
|          | 2    | Honda    | Used    | 66,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     |                                     |                                     |                                     | 5 Stars | \$16,000  |
|          | 3    | Ford     | New     | 11     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     |                                     |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$21,000  |
|          | 4    | Chevy    | New     | 13     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars | \$23,000  |
| SUV      | 5    | Honda    | Used    | 39,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$19,000  |
|          | 6    | Toyota   | New     | 8      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5     | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$29,000  |
|          | 7    | Dodge    | New     | 12     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$29,000  |
|          | 8    | Chevy    | New     | 6      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$38,000  |
| LUXURY   | 9    | Audi     | New     | 11     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$35,000  |
|          | 10   | BMW      | New     | 12     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | 5 Stars | \$60,000  |
|          | 11   | Porsche  | New     | 7      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2     |                                     |                                     |                                     | 5 Stars | \$105,000 |
| TRUCK    | 12   | Ferrari  | New     | 2      | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | 2     |                                     |                                     |                                     | 5 Stars | \$125,000 |
|          | 13   | Toyota   | Used    | 74,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 3     | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$18,000  |
|          | 14   | Dodge    | New     | 11     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5     | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$22,000  |
|          | 15   | Ford     | Used    | 98,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5     |                                     |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$15,000  |
| VAN      | 16   | Chevy    | New     | 24     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5     | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars | \$28,000  |
|          | 17   | Kia      | Used    | 47,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$22,000  |
|          | 18   | Dodge    | New     | 23     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars | \$24,000  |
|          | 19   | Chrysler | New     | 17     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$25,000  |
|          | 20   | Honda    | New     | 19     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$35,000  |

W = White | B = Black | R = Red | S = Silver

| SCENARIO #1   | SCENARIO #2 |
|---|-------------|
| Vehicles Selected (#):  |             |
| Level of satisfaction with stated requirements (1-10)<br>(10 = Extremely Satisfied & 1 = Extremely Dissatisfied): |             |

# ***POLL RESULTS***



# Feedback...

- **Most Common:**
  - SUV Dodge @ \$29k
  - SUV Chevy @ \$38k
  - VAN: Dodge @ \$24k
  - VAN Chrysler @ \$25k
- Which cost option **should** the dealer pick (if you can only pick one)?
- It was clearly helpful to have **more** information?
- What was **missing**?

# Feedback...

- **Be clear on your expectations:**

- Need a new vehicle, not used

- Need 5-star safety rating

- Would like it to be black or silver

- Would like Back-Up Camera

- Probably an SUV (3 kids plus 2 adults)

*Mandatory Requirements?*

*Desired Items?*

# SCENARIO #3

- Here are some of my expectations:

- Need a new vehicle, not used
- Need 5-star safety rating
- Do not want a red-colored vehicle
- Would like Back-Up Camera
- Need at least 5 seats (3 kids plus 2 adults)
- Must be able to go/take it camping in the forest
- My maximum budget is \$27,000

| CATEGORY | MAKE  | TYPE     | MILEAGE | COLOR                               |                                     |                                     | SEATS                               | OPTIONS                             |                                     |                                     | SAFETY  | MSRP     |             |
|----------|-------|----------|---------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------|----------|-------------|
|          |       |          |         | W                                   | B                                   | R                                   |                                     | S                                   | BACKUP CAMERA                       | REMOVABLE SEATS                     |         |          | TOW PACKAGE |
| SEDAN    | 1     | Kia      | Used    | 59,000                              | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | 4                                   |                                     |                                     |         | 5 Stars  | \$14,000    |
|          | 2     | Honda    | Used    | 66,000                              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4                                   |                                     |                                     |         | 5 Stars  | \$16,000    |
|          | 3     | Ford     | New     | 11                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4                                   |                                     |                                     |         | 5 Stars  | \$21,000    |
|          | 4     | Chevy    | New     | 13                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4                                   | <input checked="" type="checkbox"/> |                                     |         | 5 Stars  | \$23,000    |
| SUV      | 5     | Honda    | Used    | 39,000                              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |         | 5 Stars  | \$19,000    |
|          | 6     | Toyota   | New     | 8                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5                                   | <input checked="" type="checkbox"/> |                                     |         | 5 Stars  | \$29,000    |
|          | 7     | Dodge    | New     | 12                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |         | 5 Stars  | \$29,000    |
| LUXURY   | 8     | Chevy    | New     | 6                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |         | 5 Stars  | \$38,000    |
|          | 9     | Audi     | New     | 11                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |         | 5 Stars  | \$35,000    |
|          | 10    | BMW      | New     | 12                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |         | 5 Stars  | \$60,000    |
| TRUCK    | 11    | Porsche  | New     | 7                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2                                   |                                     |                                     |         | 5 Stars  | \$105,000   |
|          | 12    | Ferrari  | New     | 2                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2                                   |                                     |                                     |         | 5 Stars  | \$125,000   |
|          | 13    | Toyota   | Used    | 74,000                              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 3                                   | <input checked="" type="checkbox"/> |                                     |         | 5 Stars  | \$18,000    |
| VAN      | 14    | Dodge    | New     | 11                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5                                   | <input checked="" type="checkbox"/> |                                     |         | 5 Stars  | \$22,000    |
|          | 15    | Ford     | Used    | 98,000                              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5                                   |                                     |                                     |         | 5 Stars  | \$15,000    |
|          | 16    | Chevy    | New     | 24                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5                                   | <input checked="" type="checkbox"/> |                                     |         | 5 Stars  | \$28,000    |
| VAN      | 17    | Kia      | Used    | 47,000                              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |         | 5 Stars  | \$22,000    |
|          | 18    | Dodge    | New     | 23                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7                                   | <input checked="" type="checkbox"/> |                                     |         | 5 Stars  | \$24,000    |
|          | 19    | Chrysler | New     | 17                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |         | 5 Stars  | \$25,000    |
| 20       | Honda | New      | 19      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | 5 Stars | \$35,000 |             |

W = White | B = Black | R = Red | S = Silver

| SCENARIO #1   | SCENARIO #2 | SCENARIO #3 |
|---|-------------|-------------|
| Vehicles Selected (#):  |             |             |
| Level of satisfaction with stated requirements (1-10)<br>(10 = Extremely Satisfied & 1 = Extremely Dissatisfied): |             |             |

# ***POLL RESULTS***





# Discussion

- Was it helpful to have the budget?
- Was it helpful to know the purpose/goals/objectives of the vehicle?

*Need a new vehicle, not used*

*Need 5-star safety rating*

*Do not want a red-colored vehicle*

*Would like Back-Up Camera*

*Need at least 5 seats (3 kids plus 2 adults)*

*Must be able to go/take it camping in the forest*

*My maximum budget is \$27,000*

# SCENARIO #4

- Here are some of my expectations:

- Prefer a new vehicle, not used
- Would like a 5-star safety rating
- Would prefer a red vehicle
- Would prefer a sedan or SUV
- I plan to use the vehicle to take my small boat to the lake on occasion
- I generally only have 1-2 people in the vehicle, but may have a few more when going to the lake
- Do not want a van
- A maximum budget of \$75,000

| CATEGORY | MAKE | TYPE     | MILEAGE | COLOR  |                                     |                                     |                                     | SEATS | OPTIONS                             |                                     |                                     | SAFETY  | MSRP      |
|----------|------|----------|---------|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------|-------------------------------------|-------------------------------------|-------------------------------------|---------|-----------|
|          |      |          |         | W      | B                                   | R                                   | S                                   |       | BACKUP CAMERA                       | REMOVABLE SEATS                     | TOW PACKAGE                         |         |           |
| SEDAN    | 1    | Kia      | Used    | 59,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     |                                     |                                     |                                     | 5 Stars | \$14,000  |
|          | 2    | Honda    | Used    | 66,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     |                                     |                                     |                                     | 5 Stars | \$16,000  |
|          | 3    | Ford     | New     | 11     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     |                                     |                                     |                                     | 5 Stars | \$21,000  |
|          | 4    | Chevy    | New     | 13     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars | \$23,000  |
| SUV      | 5    | Honda    | Used    | 39,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$19,000  |
|          | 6    | Toyota   | New     | 8      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5     | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars | \$29,000  |
|          | 7    | Dodge    | New     | 12     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$29,000  |
| LUXURY   | 8    | Chevy    | New     | 6      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$38,000  |
|          | 9    | Audi     | New     | 11     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$35,000  |
|          | 10   | BMW      | New     | 12     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | 5 Stars | \$60,000  |
|          | 11   | Porsche  | New     | 7      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2     |                                     |                                     |                                     | 5 Stars | \$105,000 |
| TRUCK    | 12   | Ferrari  | New     | 2      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2     |                                     |                                     |                                     | 5 Stars | \$125,000 |
|          | 13   | Toyota   | Used    | 74,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 3     | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars | \$18,000  |
|          | 14   | Dodge    | New     | 11     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5     | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars | \$22,000  |
| VAN      | 15   | Ford     | Used    | 98,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5     |                                     |                                     |                                     | 5 Stars | \$15,000  |
|          | 16   | Chevy    | New     | 24     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5     | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars | \$28,000  |
|          | 17   | Kia      | Used    | 47,000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$22,000  |
| VAN      | 18   | Dodge    | New     | 23     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars | \$24,000  |
|          | 19   | Chrysler | New     | 17     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$25,000  |
|          | 20   | Honda    | New     | 19     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars | \$35,000  |

W = White | B = Black | R = Red | S = Silver

# ***POLL RESULTS***

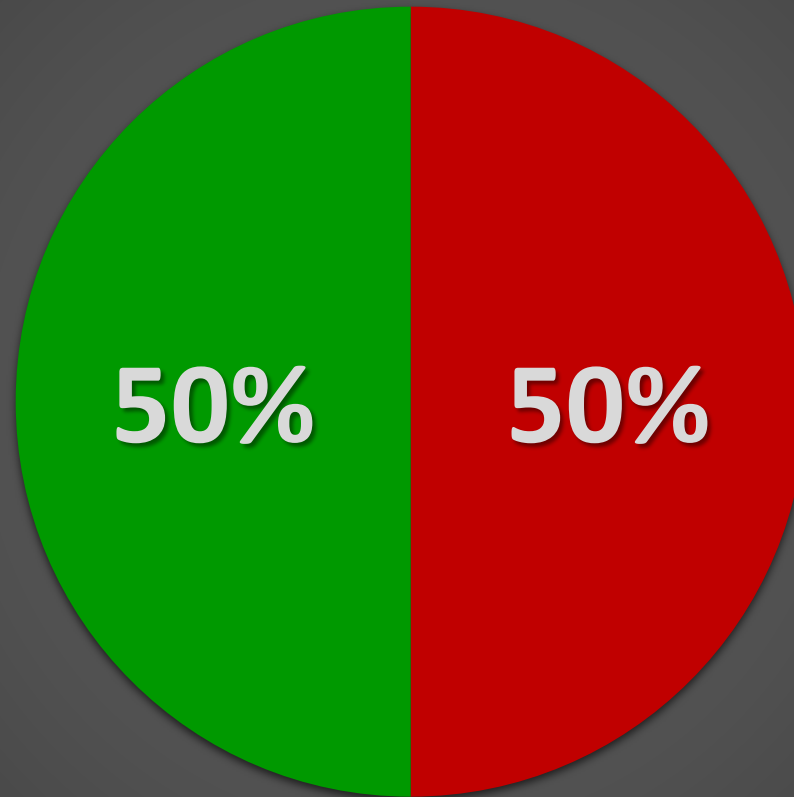


# Discussion...

- **Was it helpful to know the purpose/goals/objectives of the vehicle?**
- **Is it OK to release your budget when you have more money than you need?**
- **Will you always get price-gauged?**

# Research Shows That...

YES



NO

# SCENARIO #5

- **Here are some of my expectations:**
  - Need a truck
  - Must be a new vehicle (not used)
  - I will be using this to tow my construction trailer
  - Must have back-up camera
  - Would prefer a lighter color (white or silver)
  - I have a maximum budget of \$20,000

# ***POLL RESULTS***



# Discussion

- **Does client have enough money to meet all expectations?**
- **What are the options?**
- **What would happen if you didn't release the budget?**



# SCENARIO #6

- Here are some of my expectations:
  - Must be a Nissan Truck
  - Must have a tow package
  - Must have back-up camera
  - Must be white
  - I have a maximum budget of \$30,000

| CATEGORY | MAKE    | TYPE     | MILEAGE | COLOR                    |                                     |                                     |                                     | SEATS                               | OPTIONS       |                                     |                                     | SAFETY                              | MSRP      |           |
|----------|---------|----------|---------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------|-------------------------------------|-------------------------------------|-------------------------------------|-----------|-----------|
|          |         |          |         | W                        | B                                   | R                                   | S                                   |                                     | BACKUP CAMERA | REMOVABLE SEATS                     | TOW PACKAGE                         |                                     |           |           |
| SEDAN    | 1       | Kia      | Used    | 59,000                   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 4             |                                     |                                     |                                     | 5 Stars   | \$14,000  |
|          | 2       | Honda    | Used    | 66,000                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4             |                                     |                                     |                                     | 5 Stars   | \$16,000  |
|          | 3       | Ford     | New     | 11                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4             |                                     |                                     | <input checked="" type="checkbox"/> | 5 Stars   | \$21,000  |
|          | 4       | Chevy    | New     | 13                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4             | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars   | \$23,000  |
| SUV      | 5       | Honda    | Used    | 39,000                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | 5             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars   | \$19,000  |
|          | 6       | Toyota   | New     | 8                        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | 5             | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars   | \$29,000  |
|          | 7       | Dodge    | New     | 12                       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | 7             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars   | \$29,000  |
|          | 8       | Chevy    | New     | 6                        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars   | \$38,000  |
| LUXURY   | 9       | Audi     | New     | 11                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars   | \$35,000  |
|          | 10      | BMW      | New     | 12                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     | 5 Stars   | \$60,000  |
|          | 11      | Porsche  | New     | 7                        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 2             |                                     |                                     |                                     | 5 Stars   | \$105,000 |
| 12       | Ferrari | New      | 2       | <input type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 2                                   |               |                                     |                                     | 5 Stars                             | \$125,000 |           |
| TRUCK    | 13      | Toyota   | Used    | 74,000                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | 3             | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars   | \$18,000  |
|          | 14      | Dodge    | New     | 11                       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | 5             | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars   | \$22,000  |
|          | 15      | Ford     | Used    | 98,000                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5             |                                     |                                     | <input checked="" type="checkbox"/> | 5 Stars   | \$15,000  |
|          | 16      | Chevy    | New     | 24                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5             | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> | 5 Stars   | \$28,000  |
| VAN      | 17      | Kia      | Used    | 47,000                   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | 7             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars   | \$22,000  |
|          | 18      | Dodge    | New     | 23                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7             | <input checked="" type="checkbox"/> |                                     |                                     | 5 Stars   | \$24,000  |
|          | 19      | Chrysler | New     | 17                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars   | \$25,000  |
|          | 20      | Honda    | New     | 19                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 7             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 5 Stars   | \$35,000  |

W = White | B = Black | R = Red | S = Silver

# ***POLL RESULTS***



# Discussion

- **Would this be acceptable in Public Procurement?**
- **Cannot specify a product (unless there is clear justification), must allow “or-equal”**

# SCENARIO #7

- **I need to purchase a vehicle. I would like you to identify the best deal you can provide for a vehicle? Here are some of my expectations:**

- The vehicle must come with synthetic engine oil
- The vehicle must have windshield wipers
- I was born in May
- I have 3 younger brothers
- My brothers live in the same State
- I work for an IT company
- I would like a new car, not used
- I generally work 40-45 hours per week
- I really like my current vehicle
- I get headaches from the smell of cigarettes
- Do you think I need a tow package
- My house has really cool carpet
- I do not want a red or yellow vehicle
- I have set aside extra funds for the 'right' vehicle
- Vehicle must have a 4-speed automatic or better
- The vehicle should get great MPG
- Vehicle must come with 2 sets of keys
- Vehicle must come with full tank of gas
- I am open to any color vehicle
- I've never been camping
- How do you take a shower in the forest?
- If I get a vehicle, is 5-star better than 4?
- Would like to purchase by end of the week
- Would really like a luxury sedan
- I think SUV's are really cool
- I currently drive a 4-door sedan
- I really like Thai food, but not sushi
- My maximum budget is \$29,000
- The vehicle must have Firestone tires
- The vehicle should have chrome wheels
- Would like the vehicle to have tinted windows
- The vehicle must have great lights for night driving

# ***POLL RESULTS***



# Discrepancies

- I need to purchase a vehicle. I would like you to identify the best deal you can provide for a vehicle? Here are some of my expectations:

- The vehicle must come with synthetic engine oil
- The vehicle must have windshield wipers
- I was born in May
- I have 3 younger brothers
- My brothers live in the same State
- I work for an IT company
- I would like a new car, not used
- I generally work 40-45 hours per week
- I really like my current vehicle
- I get headaches from the smell of cigarettes
- Do you think I need a tow package
- My house has really cool carpet
- I do not want a red or yellow vehicle
- I have set aside extra funds for the 'right' vehicle
- Vehicle must have a 4-speed automatic or better
- The vehicle should get great MPG
- Vehicle must come with 2 sets of keys
- Vehicle must come with full tank of gas
- I am open to any color vehicle
- I've never been camping
- How do you take a shower in the forest?
- If I get a vehicle, is 5-star better than 4?
- Would like to purchase by end of the week
- Would really like a luxury sedan
- I think SUV's are really cool
- I currently drive a 4-door sedan
- I really like Thai food, but not sushi
- My maximum budget is \$29,000
- The vehicle must have Firestone tires
- The vehicle should have chrome wheels
- Would like the vehicle to have tinted windows
- The vehicle must have great lights for night driving

# Discrepancies

- I need to purchase a vehicle. I would like you to identify the best deal you can provide for a vehicle? Here are some of my expectations:

- The vehicle must come with synthetic engine oil
- The vehicle must have windshield wipers
- I was born in May
- I have 3 younger brothers
- My brothers live in the same State
- I work for an IT company
- I would like a new car, not used
- I generally work 40-45 hours per week
- I really like my current vehicle
- I get headaches from the smell of cigarettes
- Do you think I need a tow package
- My house has really cool carpet
- I do not want a red or yellow vehicle
- I have set aside extra funds for the 'right' vehicle
- Vehicle must have a 4-speed automatic or better
- The vehicle should get great MPG
- Vehicle must come with 2 sets of keys
- Vehicle must come with full tank of gas
- I am open to any color vehicle
- I've never been camping
- How do you take a shower in the forest?
- If I get a vehicle, is 5-star better than 4?
- Would like to purchase by end of the week
- Would really like a luxury sedan
- I think SUV's are really cool
- I currently drive a 4-door sedan
- I really like Thai food, but not sushi
- My maximum budget is \$29,000
- The vehicle must have Firestone tires
- The vehicle should have chrome wheels
- Would like the vehicle to have tinted windows
- The vehicle must have great lights for night driving

Should we share the budget?

**YES**



# Content & Structure of a High-Performing Statement of Work

# Organizing a High-Performing RFP

## RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

5 Administrative Requirements

6 Proposal Forms

7 Attachments & Exhibits

What the Client  
is Purchasing

# Organizing a High-Performing RFP

## RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

5 Administrative Requirements

6 Proposal Forms

7 Attachments & Exhibits

What the Client  
is Purchasing

How the Client will  
Evaluate and Select  
the vendor

# Content & Structure of a High-Performing SOW

## Statement of Work

- 1 Overview & Purpose
- 2 Future State
- 3 Itemized Requirements
- 4 Schedule & Budget
- 5 Unique Considerations

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## Statement of Work

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Concisely Describe  
“What” & “Why”

# Content & Structure of a High-Performing SOW

## Overview & Purpose

- **Project Overview:** high-level summary that is easily understandable (**1-2 sentences up to 1-2 paragraphs max**)

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# Content & Structure of a High-Performing SOW

## Overview & Purpose

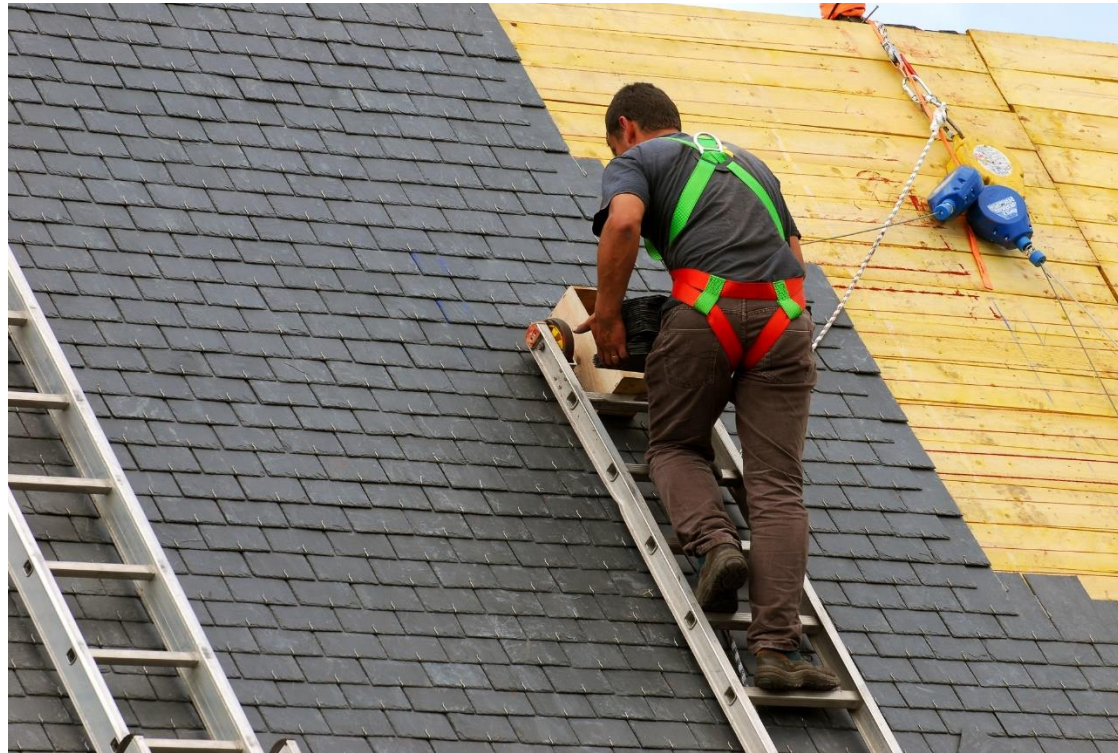
- **Project Overview:** high-level summary that is easily understandable (**1-2 sentences up to 1-2 paragraphs max**)
  - **Avoid technical language, jargon, details, or specifics.**

- **Goals, Objectives & Motivation:** primary business drivers and purpose



# Goals or Objectives

- **Install a new singles on my roof...or waterproof my building?**



# Goals or Objectives

- Goal = transport 5 children
- Goal = haul construction material and tow a trailer



# Content & Structure of a High-Performing SOW

## Overview & Purpose

- **Project Overview:** high-level summary that is easily understandable (**1-2 sentences up to 1-2 paragraphs max**)
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- **Goals, Objectives & Motivation:** primary business drivers and purpose
- **Key Measures of Success:** top 3-5 quantifiable metrics (cost, time, quality, functionality)

# Key Measures of Success

- **Key Measures of Success:** top 3-5 quantifiable metrics (cost, time, quality, functionality)
- **Difficult for Business Units to do!**
  - They often focus on activities rather than outcomes.
  - Takes intense questioning.

# Organizing a High-Performing RFP

## RFP

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What the Client  
is Purchasing

Overview &  
Purpose are right  
up front, so must  
be easy to find &  
understand!

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**Departures from  
Current Conditions**

# Content & Structure of a High-Performing SOW

## Future State

- Describe each of the deliverables/services to be provided by the selected vendor for this Statement of work
- Describe the minimum requirements that must be performed to achieve a 100% satisfaction
- Attach exhibits to make this easier to follow (i.e. drawings, specs, pictures, site plans, etc.)

# Content & Structure of a High-Performing SOW

## Future State

- **Overview:** clear, concise, & easily understandable description
- **Project Deliverables:** tangible outcomes to be produced by vendor
- **Figures, Diagrams, & References:** supporting explanation
- **Transition/Migration:** efforts to bring legacy data forward



# Content & Structure of a High-Performing SOW

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**Mandatory & Desired  
Items**

# Content & Structure of a High-Performing SOW

## Itemized Requirements

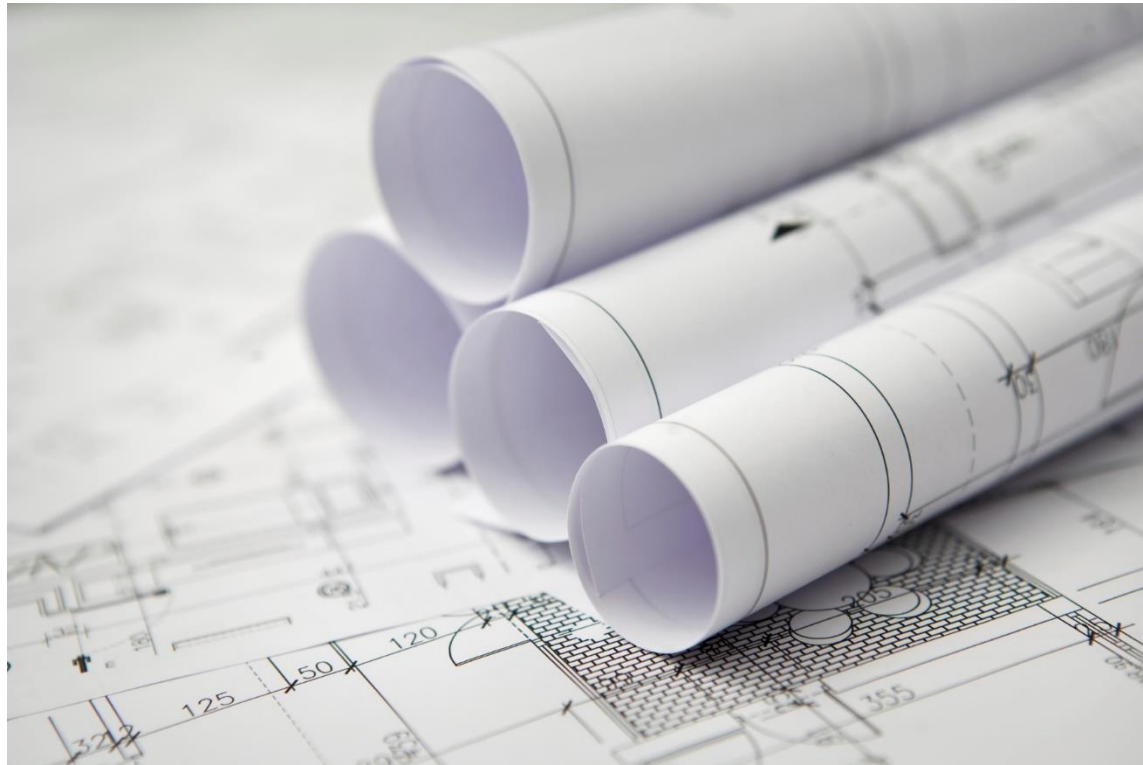
### Organization:

- Itemized
- Organized into major categories
- Attach (and reference) Exhibits to make this easier to follow (i.e. drawings, specs, pictures, diagrams, site plans, reference files, etc.)
- Do **NOT** need a written commentary for each requirement

# Content & Structure of a High-Performing SOW

## Itemized Requirements

- Drawings & Specs (Construction)



- Requirements (IT/Software)

| ID Num | Requirement Area     | Requirement Subcategory | Requirement Name     | Requirement  |
|--------|----------------------|-------------------------|----------------------|--|
| 5402   | System and Technical | Workflow                | Approval / Denial    | System shall provide ability to define multiple approval levels for electronic transactions / documents / business events processing.  |
| 5403   | System and Technical | Workflow                | Approval / Denial    | System shall provide ability to restrict processing of electronic transactions / documents / business events until they pass all required approval levels.   |
| 5404   | System and Technical | Workflow                | Approval / Denial    | System shall provide ability to set up Approver Groups associated with electronic transaction / document / business event processing.  |
| 5405   | System and Technical | Workflow                | Approval / Denial    | System shall provide the ability to define a unique approval process for each user and type of document/business event.  |
| 5406   | System and Technical | Workflow                | Approval / Denial    | System shall provide the ability to specify multiple approvers for a document/business event where only one of the approvers listed must approve the document in order to consider the document approved.                          |
| 5407   | System and Technical | Workflow                | Audit Trail          | System shall provide an audit trail of all adds, changes, and deletes to workflow rules.   |
| 5408   | System and Technical | Workflow                | General              | System shall ensure that any transaction, document or business event entered into the on-line system is reviewable prior to its saving / processing / commitment.  |
| 5409   | System and Technical | Workflow                | General              | System shall provide the ability to reverse / unwind processed transactions, documents and business events.  |
| 5410   | System and Technical | Workflow                | General              | System shall permit a minimum of 10 levels of approval that may be established for each type of electronic document/business event.  |
| 5411   | System and Technical | Workflow                | General              | System shall allow all authorized users to see the approval status of a document/business event.   |
| 5412   | System and Technical | Workflow                | General              | System shall assure that an employee is removed from and added to the workflow process based on qualifying events (e.g., termination from or appointment to agency, or transfer to another organization entity within the agency). |
| 5413   | System and Technical | Workflow                | General              | If a user modifies an electronic document/business event, the system shall allow approvals to be reprocessed in accordance with business rules.  |
| 5414   | System and Technical | Workflow                | General              | System shall provide the ability to search/retrieve documents/records based upon user defined criteria.  |
| 5415   | System and Technical | Workflow                | Notification         | System shall include a workflow process, with notification options, for business events and documents.   |
| 5416   | System and Technical | Workflow                | Notification         | System shall provide the ability to re-route transaction/document/business event for approval based upon user defined criteria such as dollar thresholds or random selection for statistical sampling purposes.                    |
| 5417   | System and Technical | Workflow                | Notification         | System electronic document management function shall be integrated with the State's electronic mail system or provide other means to alert "reviewer" of documents awaiting approval.  |
| 5418   | System and Technical | Workflow                | Tracking Document(s) | System shall provide ability to track (e.g., identify, record, inquire, report) the progress of electronic transactions / documents / business events.   |

# Content & Structure of a High-Performing SOW

## Itemized Requirements

- **Mandatory Requirements (minimum, pass/fail):**
  - vendors **MUST** meet these or be disqualified.
  - itemized, organized, and categorized
- **Desired Requirements (value proposition):**
  - vendors **NOT disqualified** for missing any individual item.
  - But the Client's goal is to achieve as many as possible.
  - itemized, organized, and categorized

# Content & Structure of a High-Performing SOW

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**Time & Financial  
Constraints**

# Content & Structure of a High-Performing SOW

## Schedule & Budget

- **Schedule:** clear & transparent identification of timing needs and constraints
- **Budget:** clear & transparent identification of financial needs and constraints

# Content & Structure of a High-Performing SOW

## Schedule & Budget

- The Budget is crucial (one of the most important SOW elements)
- Clarifies your technical Statement (what you can afford)
- Clearly define any financial constraints or expectations that you have (**not ranges or “fuzzy” information → don’t cause confusion!**)
- Be direct, such as:
  - The construction budget for this Project is \$150,000
  - The estimated spend for this Project is \$2 Million
  - The project budget is \$3,000,000 over 5 years, of which \$500,000 is allocated for implementation and \$500,000 for annual subscription/support.
- (same for Schedule expectations, constraints, critical dates, phasing, etc.)

# Content & Structure of a High-Performing SOW

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**Supplemental  
Information**



# Content & Structure of a High-Performing SOW

## Unique Considerations

- **Unique:** what may be unusual in your environment?  
(vs. the vendor's other clients)
- **Unknowns & Assumptions:** list any conditions that are unknown or assumed
- **Attachments & Exhibits:** pertinent supplemental information

*Keep in Mind...*

***Goal Is Not  
Perfection!***



***Goal Is Not  
Perfection!***



***Do Our Best  
Within Resource  
Constraints***



***...But We  
Can't Totally  
Miss The  
Target!!!***

# Balancing Act:

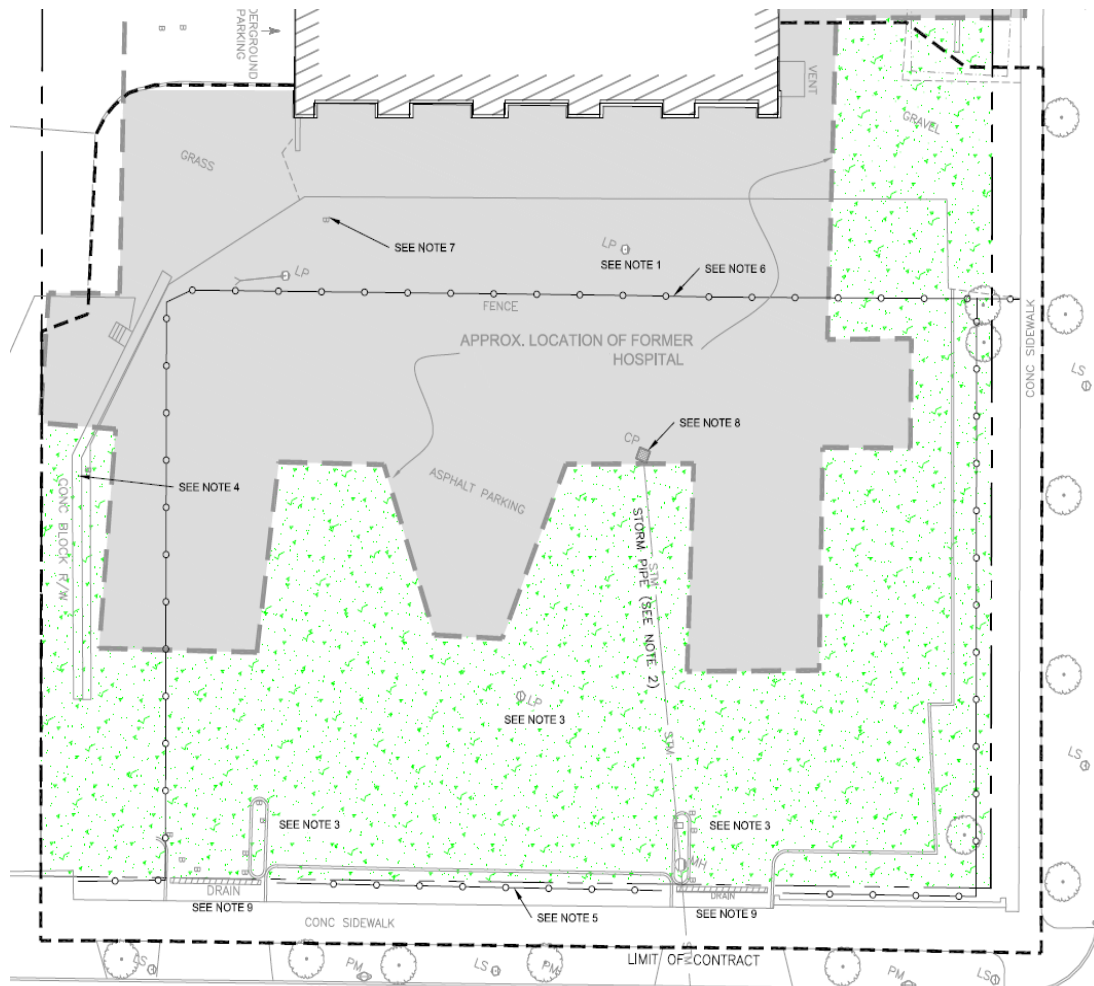
Too Open-Ended  
vs.  
Overly Prescriptive

# Public Sector Agency

- Full Technical Specification: “Pls dig a hol”



# Construction Example: Site Excavation & Remediation





# Construction Example: Site Excavation & Remediation



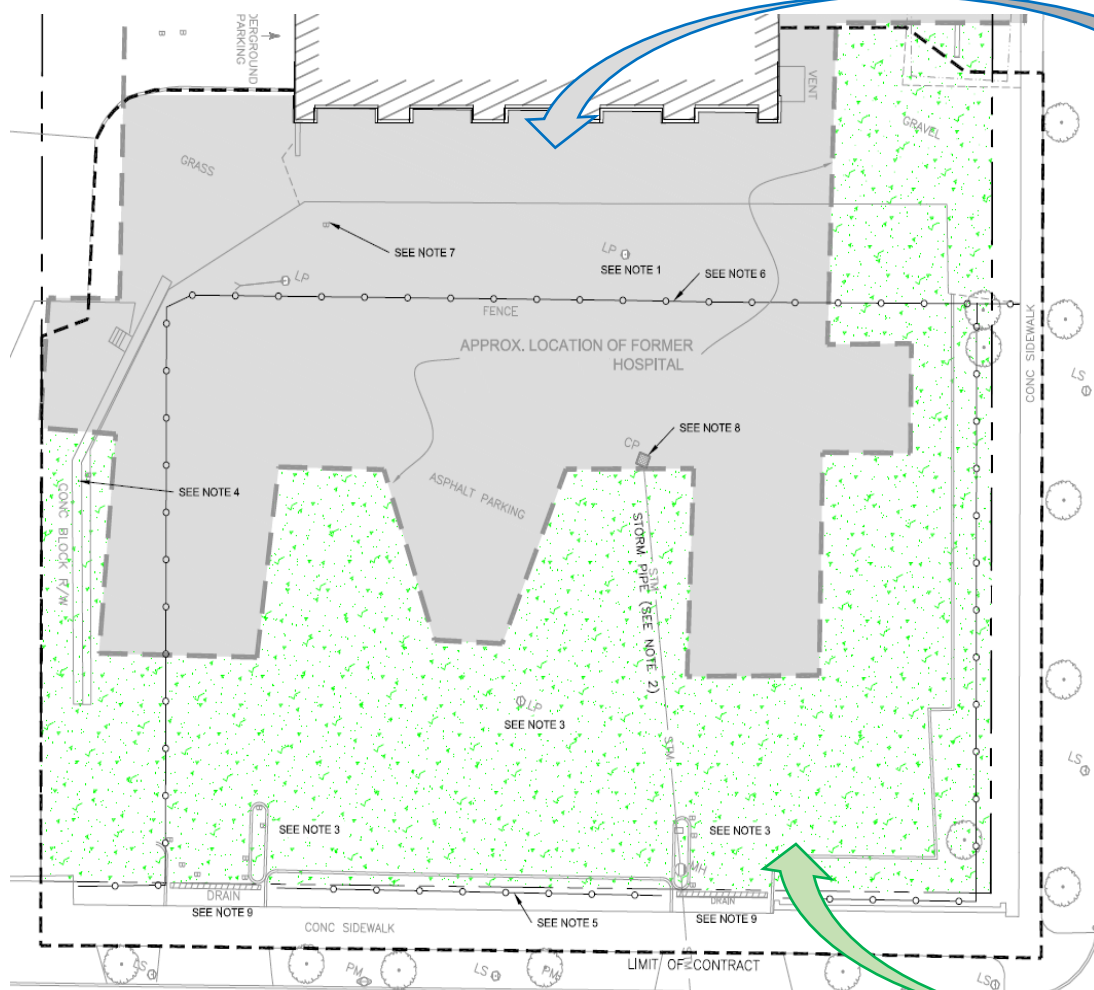
# Construction Example: Site Excavation & Remediation



# Construction Example: Site Excavation & Remediation



# Construction Example: Site Excavation & Remediation



“Silt and sand soil, mixed with debris from the demolition of the hospital, and often underlain by a concrete slab or footings ranging from 1.8 to 3m thick.”

Contaminants: petroleum hydrocarbons, metals (arsenic, lead & iron), PAHs, & asbestos-containing materials, etc.

➤ **No benchmark to propose to...**  
**(Contractors caught between a “no bid”  
\*or\* adding contingency for unknowns)**

“Primarily dark brown/grey silty sand with gravel.”

# Set a Benchmark to Propose to!!!!

- Ensure proposals are apples-to-apples (**as much as possible**)

# Set a Benchmark to Propose to!!!!

- Ensure proposals are apples-to-apples (**as much as possible**)

# EXAMPLE

# Set a Benchmark to Propose to!!!!

- Ensure proposals are apples-to-apples (**as much as possible**)
- This is the answer to...  
**“How do I know if I am too Open-Ended?”**
- *If you’ve established a solid benchmark to bid to...*
- *... you have probably provided “enough” SOW info to avoid being open-ended.*

# Impact of Open-Ended or Unclear SOW

- Open to interpretation
  - Encourages the minimum
  - Less consistency in pricing (*wider range in cost proposals*)
  - Less competitive pricing (*increased contingency*)
  - Discourages vendors from submitting
- **Brings Risk to the Project!**



# Waste Hauling SOW



**5,000+ tons of waste collection across urban area**

- “An adequate fleet of collection vehicles should be used and maintained by the Vendor...”
- “It is the [Owner’s] expectation that collection vehicles designated for service should at a **minimum be less than two years old at the start of the contract**”

# Waste Hauling SOW



**5,000+ tons of waste collection across urban area**

- “In order to support accurate measurements towards the [Client’s] sustainability goals, all vehicles must be solely dedicated to [the Client] and cannot be used for other sites.”

# Waste Hauling SOW



**5,000+ tons of waste collection across urban area**

- Average Proposal Price: +46% over the Budget
- Maximum Proposal Price: +106% Over the Budget
- SOW was put together with great intentions
  - Seeking high quality services & impressive sustainability goals.
- Over-emphasis on the inputs (restricting vendor means & methods) can detract from the outcomes (results)!

# Key Learning Points

- A clear scope of work is important to streamline the evaluation process
  - But it doesn't have to be perfect!
- Provide your budget!
- As procurement, we can act as facilitators – use the checklist!

# A “Client-of-Choice” (“Customer-of-Choice”)

- Suppliers/Vendors/Contractors want to work for you over other owners
- Clients-of-Choice get vendors’ **best teams (experts)** on their projects
- Vendors spend the time to put together an **accurate proposal**
- Client-of-Choice personnel know how to **behave with experts**
- Client-of-Choice has an owner “team” that is **trained and prepared** to work in a high performing delivery environment

# Free Webinar Series

**3<sup>rd</sup> Thursdays every month**

**@ 12pm Central**

*15-min Teaching Moment*

(learn a new tip, trick, or tool)

*30-min Virtual Peer Group*

(network with professionals)

*Office Hours*

(open Q&A until the questions run out!)



# Previous Recordings Available Online!

How Do You Ask For  
(& Evaluate) Cost Proposals  
In Software RFPs?

April 15, 2021



Simpliar's Evaluation  
Criteria to Minimize  
Budget Risk

May 20, 2021



Current State of Practice  
In Software RFPs

June 17, 2021



How to do Market  
Research More  
Effectively

July 15, 2021



“Don’t Worry, the  
Contract Will  
Save Us”

August 19, 2021



The Value of  
Debriefings

September 16, 2021



Handling Large IT  
Hardware Buys  
With Different Scope Packages

October 21, 2021



Vendor of  
Record Programs

November 18, 2021



7 Most Deadly  
Marketing Phrases

December 16, 2021



It's a New Year -  
Ready for the  
Next Level?

January 20, 2022



Best Practices for  
Evaluator Training

February 17, 2022



Got RFP Soft Skills?

March 17, 2022




[center4procurement.org](https://center4procurement.org)

21

March

← Tomorrow!

 Add to Calendar



## Procuring Architecture & Engineering Professional Services

We'll explore the best way to procure A&E services from professionals that are highly rated in their field. You'll gain a better understanding of the do's and don'ts, the resources available, and how to make sure you're finding people

18

April

 Add to Calendar




## What Happens When You Use an RFP for Construction?

Most construction contracts are procured via Low Bid. But what happens when you use a best-value RFP approach? We'll review a study that did exactly this for 150+ construction projects. The results are surprising!

16

May

 Add to Calendar



## Can Procurement Professionals Predict the Future?

Is it possible to forecast project outcomes based on proposal quality alone? To find out, we tracked proposal scores of selected vendors vs. client satisfaction at the end of the project. Join this session to see what we found!



# Upcoming Topics!

Register at: [center4procurement.org/rfp-doctor](https://center4procurement.org/rfp-doctor)





# \*FREE\* Online Course!



## Better RFPs = Better Projects

- Session #1 = Organizing a High-Performing RFP
- Session #2 = Effective Statements of Work (SOWs)
- Session #3 = Evaluation Best Practices & RFP Admin
- Session #4 = RFP Ethics & Vendor Debriefings

## Register via NASPO's Procurement U

- Log on to the Procurement U Learning Management System (LMS) to register, access the course and materials.
  - [www.naspo.org/procurement-u/](http://www.naspo.org/procurement-u/)
- Open to all (even non-members of NASPO)
- Limited to first 100 participants.

# Key Learning Points

- A clear scope of work is important to [streamline the evaluation process](#)
  - But it doesn't have to be perfect!
- [Provide your budget!](#)
- As procurement, we can [act as facilitators](#) – use the checklist!



[Jeff.Sawyer@center4procurement.org](mailto:Jeff.Sawyer@center4procurement.org)