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Best Practices in Procuring Enterprise-Level Software Solutions

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Agenda

- RFP structure
- A note on developing a Statement of Work
- Cost evaluations in IT
- The pitfalls of IT Demos

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Motivation: IT is Difficult!

The data are scary!

- **CHAOS Report:**
  - **72%** of projects are **challenged** or **failed**
- **Oxford University & McKinsey:**
  - **66%** cost overruns. **33%** schedule overruns
  - **17% shortfall in actual scope** vs. original plan
- **Feedback from 600 IT Execs:**
  - **75%** admitted their projects were either “**always**” or “**usually**” **doomed right from the start**.

SIMPLAR

IT Project Delivery: Is it Really so Tough? Let's see the Data!

Common Perceptions

Everyone knows that delivering an Information Technology (IT) project is tough. In casual conversation, this perception is often expressed in statements such as:

"IT has a high failure rate" • *"Software implementations almost never reach their 'Go Live' target on time"* • *"Stabilization is a euphemism for fixing all the mistakes that weren't resolved in implementation"* • *"Scope gaps and change orders are just a normal part of doing business"*

But are these statements true? How tough is IT Project Delivery, really? Let's see the data!

Studies of IT Project Performance are Extremely Consistent

Many studies have measured IT Project Performance - Here are some results

CHAOS Report: The Standish Group has compiled IT projects for three decades and their recent data show:

46% of Projects are Challenged: complete & operational, but over-budget, over-schedule, and offer fewer features than specified.

26% of the Projects Fail: they are canceled or not used after implementation.

The Data Proves IT Projects are Very Tough. Should We Run Away in Terror?

We need to consider a different approach to delivering IT projects. After all, the definition of insanity is "doing the same thing over and over again and expecting different results."

Doomed From the Start? Based on feedback from 600 U.S. Business & IT Executives, Geneca found:

- 75% admitted their projects were either "always" or "usually" doomed right from the start
- 61% of the projects take longer than anticipated
- 57% are not considered a success
- 80% admitted they spend at least half their time on rework, which is the result of unclear objectives, confusion of roles and responsibilities, and lack of stakeholder involvement

Large IT Projects Cost Much More than Planned:
McKinsey and University of Oxford studied 5400 IT projects

44% — 44% of projects deliver near the expected value

66% — 66% average cost increase and 33% average schedule overrun

The larger the IT project, the the worse it performs

A Different Approach: Expertise-driven Project Delivery (XPD™)

XPD has been applied on 3,000+ projects worth over $15B, including IT Projects ranging from $100k to $100M+ for both private and public entities. XPD results include tens of millions in project savings, reduction in delays, and reduced effort in delivery.

Simplar provides the hands-on implementation support, training, and all the tools, templates, and techniques needed to successfully buy and deliver your next IT project using XPD

SIMPLAR *Simple Solutions | Exemplary Results* *Tools + Training + Research* www.simplar.com

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CPE commissioned a study

Current State of Practice in the Procurement of Information Technology Solutions:

Content Analysis of Software RFPs

International Journal of Project Management

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Current State of Practice in Software RFPs

- **Analysis**: CPE conducted a detailed review of more than 250 Software RFPs, including:
  - ERP, Asset Management, Financial Systems, and more.

- **Objective**: to understand common practices across the country

- **Result**: See what your peers are doing!

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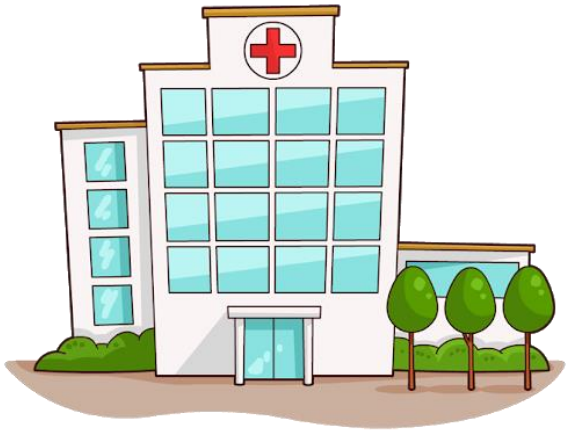
Data Sample of 250 RFPs

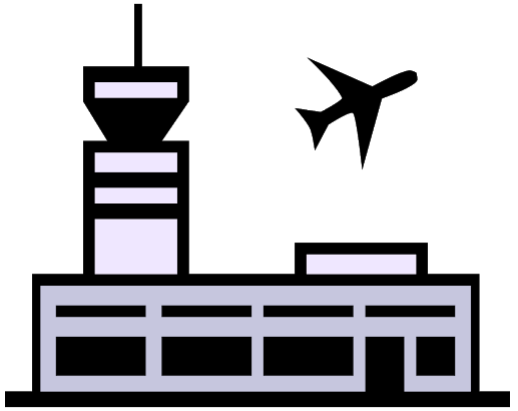
- **Range of public sector clients:**

Government
Municipal
County
State



Education
Higher
Elementary

Healthcare
Hospitals
Medical Systems



Transportation
DOTs
Aviation
Ports

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50 RFPs from each Five Software Types:

ERP

Financial

Asset Mgmt

Common Business Apps

Specialized Business Apps

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What did we find?

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What did we find?

Common Evaluation Criteria

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Evaluation Best Practices?

- **Less than half** shared evaluation weights.
- Sharing evaluation weights is a CPE Best Practice!

- **Less than half** used proposal templates or forms.
- Standard Proposal Forms are a CPE Best Practice!

- **Less than half** used a Cost Template.
- Apples-to-Apples Cost Forms are a CPE Best Practice!

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Common Evaluation Criteria & Weighting

- **Among the 107 RFPs that shared their weights:**

Evaluation Criteria	Frequency (# of RFPs)	Average (%)	Minimum (%)	Maximum %
Implementation Approach	103	27%	10%	61%
Cost Proposal	102	21%	3%	60%
Company Qualifications	98	21%	4%	60%
System Capability	77	31%	10%	60%
Software Demo	36	17%	6%	31%
RFP Requirements	32	12%	4%	40%
Project Team Qualifications	30	17%	4%	45%
All Other Criteria	23	8%	1%	20%

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CPE Best Practice:

No single evaluation criterion more than 35%

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Evaluation Best Practices?

Fair | Open | Transparent | Value | Integrity

CPE Best Practices:
Critical to become a Client of Choice!

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What did we find?

RFP Timelines

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Timelines Published in the RFP*
(*may not be actual)

Planned Duration	Mean	Median	Min	Max
Bidding (n=245)	**1 Month** (34 days)	**1 Month** (33 days)	**1 Week** (9 days)	**2.5 Months** (80 days)
Evaluation (n=167)	**1.5 Months** (49 days)	**1 Month** (37 days)	**1 Day**	**14.5 Months** (434 days)
Negotiation (n=78)	**1 Month** (34 days)	**1 Month** (30 days)	**3 Days**	**4.5 Months** (140 days)
Implementation (n=74)	**8 Months** (265 days)	**6 Months** (180 days)	**1 Month** (30 days)	**2 Years** (730 days)

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1+ month bidding period

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Not enough time!

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Timelines Published in the RFP*
(*may not be actual)

Planned Duration	Mean	Median	Min	Max
Bidding (n=245)				Months days)
Evaluation (n=167)				Months 4 days)
Negotiation (n=78)				Months 0 days)
Implementation (n=74)	(265 days)	(180 days)	(30 days)	Years (730 days)

CPE Best Practice:

Publish the full schedule for Transparency!

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What did we find?

SOW & Requirements

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Number of Detailed Requirements

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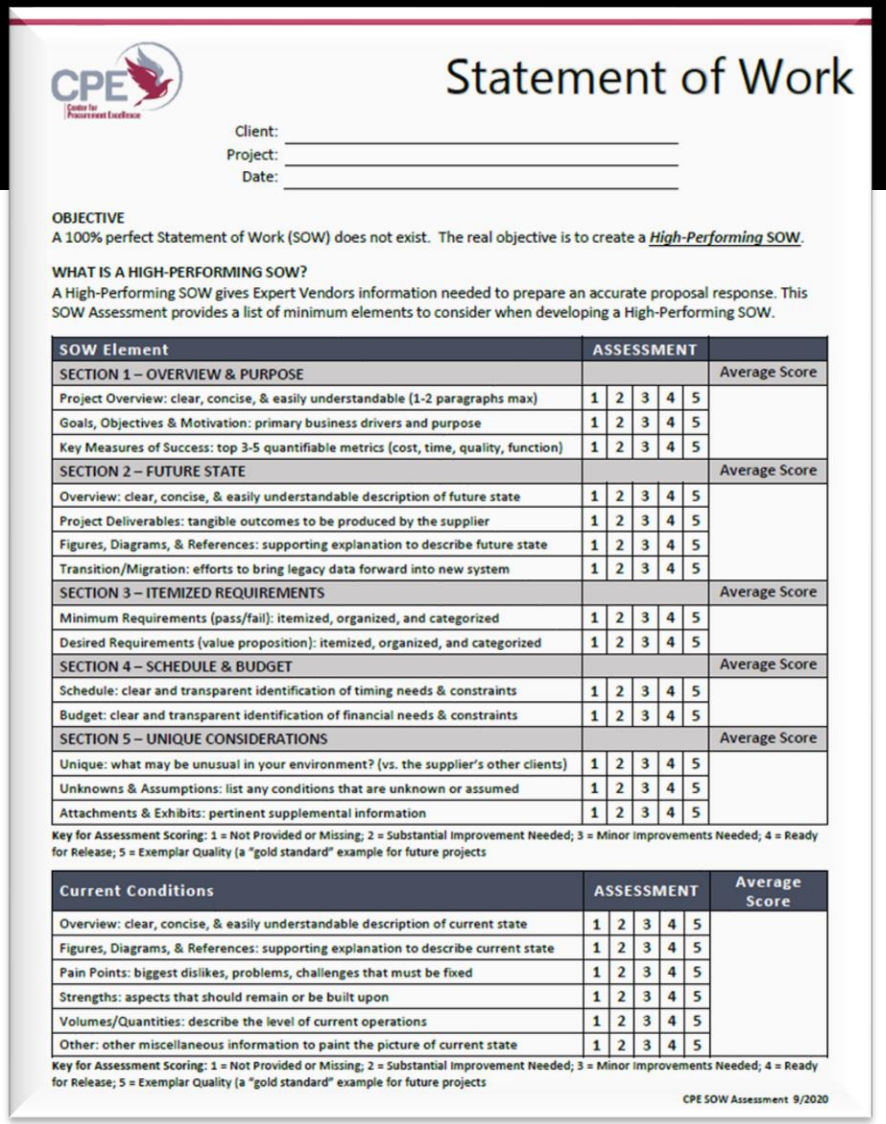
Statement of Work

- Shared the Budget: 2%
- Shared the Schedule: 30%
- Current Conditions: < 5%



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Statement of Work

Client: _____

Project: _____

Date: _____

OBJECTIVE

A 100% perfect Statement of Work (SOW) does not exist. The real objective is to create a ***High-Performing*** **SOW**.

WHAT IS A HIGH-PERFORMING SOW?

A High-Performing SOW gives Expert Vendors information needed to prepare an accurate proposal response. This SOW Assessment provides a list of minimum elements to consider when developing a High-Performing SOW.

SOW Element	ASSESSMENT					
SECTION 1 – OVERVIEW & PURPOSE						Average Score
Project Overview: clear, concise, & easily understandable (1-2 paragraphs max)	1	2	3	4	5	
Goals, Objectives & Motivation: primary business drivers and purpose	1	2	3	4	5	
Key Measures of Success: top 3-5 quantifiable metrics (cost, time, quality, function)	1	2	3	4	5	
SECTION 2 – FUTURE STATE						Average Score
Overview: clear, concise, & easily understandable description of future state	1	2	3	4	5	
Project Deliverables: tangible outcomes to be produced by the supplier	1	2	3	4	5	
Figures, Diagrams, & References: supporting explanation to describe future state	1	2	3	4	5	
Transition/Migration: efforts to bring legacy data forward into new system	1	2	3	4	5	
SECTION 3 – ITEMIZED REQUIREMENTS						Average Score
Minimum Requirements (pass/fail): itemized, organized, and categorized	1	2	3	4	5	
Desired Requirements (value proposition): itemized, organized, and categorized	1	2	3	4	5	
SECTION 4 – SCHEDULE & BUDGET						Average Score
Schedule: clear and transparent identification of timing needs & constraints	1	2	3	4	5	
Budget: clear and transparent identification of financial needs & constraints	1	2	3	4	5	
SECTION 5 – UNIQUE CONSIDERATIONS						Average Score
Unique: what may be unusual in your environment? (vs. the supplier's other clients)	1	2	3	4	5	
Unknowns & Assumptions: list any conditions that are unknown or assumed	1	2	3	4	5	
Attachments & Exhibits: pertinent supplemental information	1	2	3	4	5	

Key for Assessment Scoring: 1 = Not Provided or Missing; 2 = Substantial Improvement Needed; 3 = Minor Improvements Needed; 4 = Ready for Release; 5 = Exemplar Quality (a "gold standard" example for future projects

Current Conditions	ASSESSMENT					Average Score
Overview: clear, concise, & easily understandable description of current state	1	2	3	4	5	
Figures, Diagrams, & References: supporting explanation to describe current state	1	2	3	4	5	
Pain Points: biggest dislikes, problems, challenges that must be fixed	1	2	3	4	5	
Strengths: aspects that should remain or be built upon	1	2	3	4	5	
Volumes/Quantities: describe the level of current operations	1	2	3	4	5	
Other: other miscellaneous information to paint the picture of current state	1	2	3	4	5	

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CPE SOW Assessment 9/2020

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A note on Statements of Work…

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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

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Organizing a High-Performing RFP

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Information Technology (IT)
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1. Statement of Work
2. Current Conditions

What the Client is Purchasing

3. Proposal Requirements
4. Evaluation Procedures
5. Administrative Requirements
6. Proposal Forms
7. Attachments & Exhibits

How the Client will Evaluate and Select the vendor

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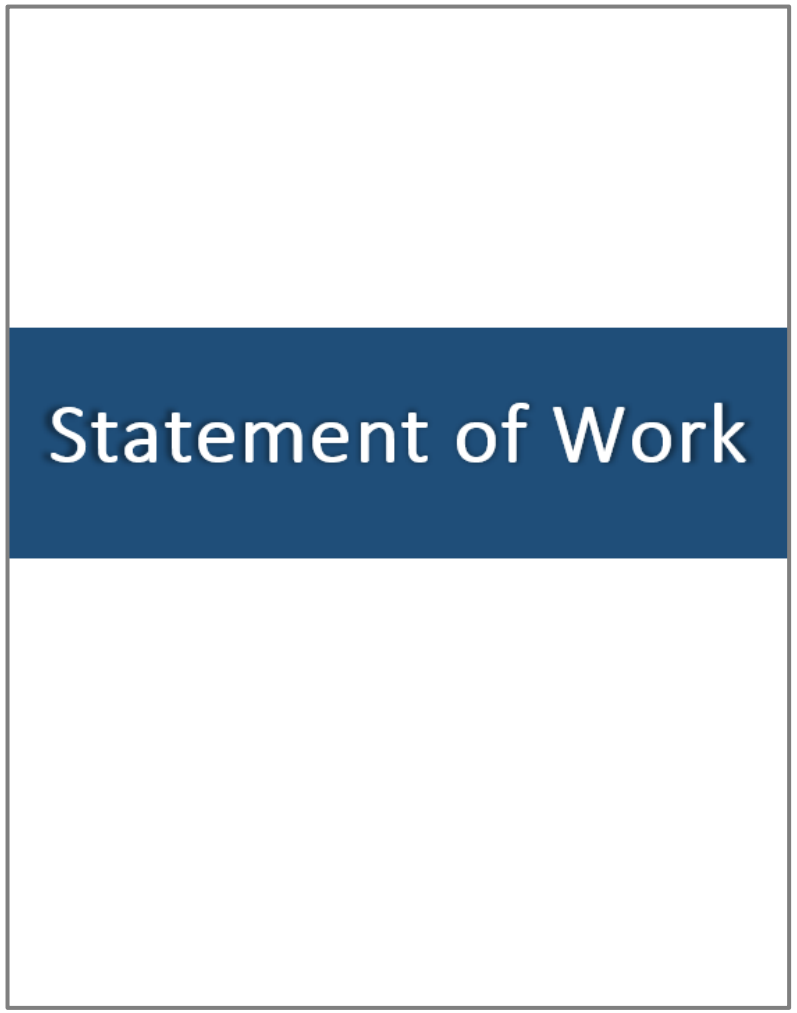
Content & Structure of a High-Performing SOW



1 Overview & Purpose = ***why are we doing this project?***

2 Future State = ***how will things be different at the end?***

3 Itemized Requirements = ***what, specifically, are you buying?***

4 Schedule & Budget = ***any schedule & financial constraints?***

5 Unique Considerations = ***any major assumptions?***

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How do you ask for Cost Proposals in Software RFPs?

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CPE's Cost Proposal Form for Software RFPs

RFP

Request for Proposal

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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

Use a standard form to collect Cost Proposals!

Forms for Vendors to Complete

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CPE's Cost Proposal Form for Software RFPs

RFP

Request for Proposal

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Information Technology (IT)
Software Implementation Template

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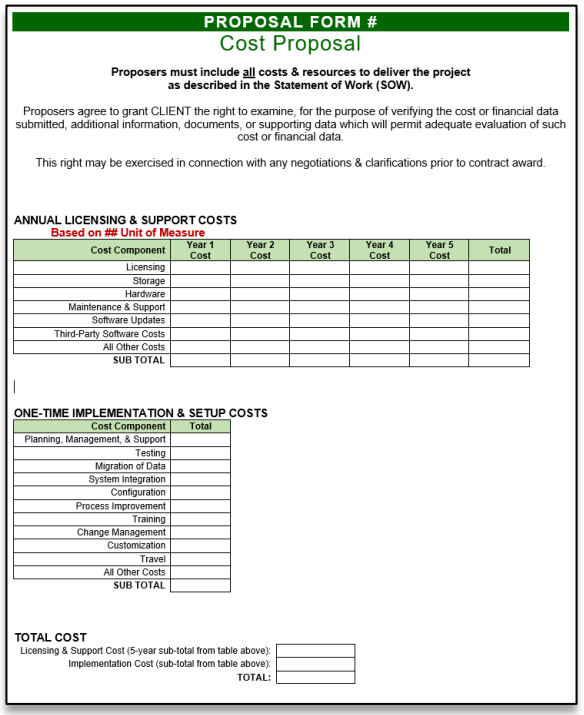

PROPOSAL FORM #

Cost Proposal

Proposers must include all costs & resources to deliver the project as described in the Statement of Work (SOW).

Proposers agree to grant CLIENT the right to examine, for the purpose of verifying the cost or financial data submitted, additional information, documents, or supporting data which will permit adequate evaluation of such cost or financial data.

This right may be exercised in connection with any negotiations & clarifications prior to contract award.

ANNUAL LICENSING & SUPPORT COSTS
Based on ## Unit of Measure

Cost Component	Year 1 Cost	Year 2 Cost	Year 3 Cost	Year 4 Cost	Year 5 Cost	Total
Licensing						
Storage						
Hardware						
Maintenance & Support						
Software Updates						
Third-Party Software Costs						
All Other Costs						
SUB TOTAL						

ONE-TIME IMPLEMENTATION & SETUP COSTS

Cost Component	Total
Planning, Management, & Support	
Testing	
Migration of Data	
System Integration	
Configuration	
Process Improvement	
Training	
Change Management	
Customization	
Travel	
All Other Costs	
SUB TOTAL	

TOTAL COST

Licensing & Support Cost (5-year sub-total from table above):	
Implementation Cost (sub-total from table above):	
TOTAL:	

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TOTAL COST

Licensing & Support Cost (5-year sub-total from table above):	
Implementation Cost (sub-total from table above):	
TOTAL:	

CPE's Cost Proposal Form

- Quantitative / Numeric
- Standardized

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CPE's Cost Proposal Form for Software RFPs

ANNUAL LICENSING & SUPPORT COSTS

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CPE's Cost Proposal Form for Software RFPs

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CPE's Cost Proposal Form for Software RFPs

TOTAL COST

Licensing & Support Cost (5-year sub-total from table above):	
Implementation Cost (sub-total from table above):	
TOTAL:	

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How do you evaluate Cost Proposals in Software RFPs?

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How do you evaluate Cost Proposals in Software RFPs?

Four Quick Steps!

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3 Common Pitfalls

- **Open-Ended | not using a standardized proposal form**
  (vendors submit their own format = difficult to analyze)

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3 Common Pitfalls

- **Open-Ended** | **not using a standardized proposal form**
  (vendors submit their own format = difficult to analyze)

- **Too Detailed** | **asking for in-depth cost breakdowns**
  (vendors likely to add assumptions, caveats, & disclaimers)

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3 Common Pitfalls

- **Open-Ended** | **not using a standardized proposal form**
  (vendors submit their own format = difficult to analyze)

- **Too Detailed** | **asking for in-depth cost breakdowns**
  (vendors likely to add assumptions, caveats, & disclaimers)

- **Too Complex** | **challenging formats & multi-scenarios**
  (vendors may get overwhelmed and/or make mistakes)

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Examples of Pitfalls-in-Action

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Example A: Open-Ended

Document Mgmt Project

5-YEAR COST TABLE	
FIRM 102	$488,435
FIRM 107	$1,301,514
FIRM 105	$2,131,800
FIRM 104	$2,359,122
FIRM 103	$2,932,985
FIRM 109	$3,253,863
FIRM 101	$4,210,000
FIRM 110	$4,694,650
FIRM 106	$5,049,816
FIRM 108	$20,102,522

- **Vendors submitted a wide range of exclusions, caveats, and assumptions**

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Example A: Open-Ended

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FIRM 106	$5,049,816
FIRM 108	$20,102,522

- Vendors submitted a wide range of exclusions, caveats, and assumptions

- Not apples-to-apples!
- Cannot do direct comparisons with a high degree of confidence!
- Likely hints at a poor SOW too!

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Example B: Not Comparable

ERP Project

	Vendor 1	Vendor 2	Vendor 3	Vendor 4
5-Year Total Cost:	$5.4M	$5.8M	$7.9M	$8.5M
Quoted Licenses:	1,260 to 1,450	0*	2,200	1,300

*TBD later after they are awarded the contract

→Quoted licenses ranged from 0 – 2,200!
→Not Complete!!! Not Directly Comparable!!!

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Use the Cost Proposal Form to Set a Benchmark!

ERP Project

	Vendor 1	Vendor 2	Vendor 3	Vendor 4
5-Year Total Cost:	$5.4M	$5.8M	$7.9M	$8.5M
Quoted Licenses:	1,260 to 1,450	0*	2,200	1,300

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Licensing						
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All Other Costs						
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Foundations of a High-Performing Cost Evaluation

- **Client's SOW & Cost Proposal Form must:**
  - Understand the **major cost drivers** for the systems/suppliers
  - Choose **reasonable benchmarks** for vendors to bid to.

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Foundations of a High-Performing Cost Evaluation

- **Client's SOW & Cost Proposal Form must:**
  - Understand the **major cost drivers** for the systems/suppliers
  - Choose **reasonable benchmarks** for vendors to bid to.

How do vendors price their systems?

- **Licenses**? What type(s), how to count, etc.?
- **Employees**? How many, what categories, etc.?
- **Transactions**? Which ones, how to count, what times, etc.?
- **Storage**? How much, which items, # of files, etc.?
- And so on…

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Example C: Too Complex

Sales & Customer Relationship Mgmt RFP

Price Response

Instructions to Vendor:

1 Use the below tabs to provide pricing details to meet full compliance for each designated Scope of Work you are proposing.

2 This price shall include software and reoccurring annual costs, implementation, and hardware.

3 List any pricing assumptions and/or notes below the spreadsheet.

4 The "Cost Component" entries in each table are meant to be examples. You may change/add/delete these entries as necessary to formulate your cost proposal.

5 In the table below please provide adjusted cost if all proposed scope areas are awarded to your company.

Scope Area	Scope Area #1 Sales Enablement	Scope Area #2 Content Management	Scope Area #3 Data to Text Automation	Scope Area #4 Data Aggregation & Integration	Scope Area #5 RFP Automation
Total Cost of each socpe area (individual award)	$ -	$ -	$ -	$ -	$ -
Total Cost for each scope area (if all proposed are awarded)					
Total RFP cost	$ -				

Discount/Cost savings if awarded all proposed Scope Areas (brief explanation)

Summary | Scope #1 Sales Enablement | Scope #2 Content Management | Scope #3 Data to Text Auto. | Scope #4 Data Aggre.&Integ. | Scope #5 RFP Automation

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Example C: Too Complex

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Total Cost of each socpe area (individual award)	$ -	$ -	$ -	$ -	$ -
Total Cost for each scope area (if all proposed are awarded)					
Total RFP cost	$ -				

Discount/Cost savings if awarded all proposed Scope Areas (brief explanation)

5 Different Scope Areas

Summary | Scope #1 Sales Enablement | Scope #2 Content Management | Scope #3 Data to Text Auto. | Scope #4 Data Aggre.&Integ. | Scope #5 RFP Automation

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Example C: Too Complex

Sales & Customer Relationship Mgmt RFP

Price Response

Instructions to Vendor:

1 Use the below tabs to provide pricing details to meet full compliance for each designated Scope of Work you are proposing.

2 This price shall include software and reoccurring annual costs, implementation, and hardware.

3 List any pricing assumptions and/or notes below the spreadsheet.

4 The "Cost Component" entries in each table are meant to be examples. You may change/add/delete these entries as necessary to formulate your cost proposal.

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5 Different Scope Areas

+ combos & discounts

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Spreadsheet rather than simple Cost Form

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Example C: Too Complex

Sales & Customer Relationship Mgmt RFP

Challenges

- **Vendors each interpreted the form differently**
- **Difficult to Evaluate the different pricing "bundles"**
- **Nearly 30% of invited vendors declined to bid**
  - "Lack of Bandwidth"
  - "We are not able to respond to RFPs"
  - "We thought you wanted to bundle everything to a large firm"

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What are Software Demos?

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What are Software Demos?

Evaluation of the Software Product itself.

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What are Software Demos?

RFP

Request for Proposal

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Information Technology (IT)

Software Implementation Template

RFP Number: #####
RFP Release Date: MM/DD/YYYY
RFP Due Date: MM/DD/YYYY

Evaluation

Proposal

Pricing

Demos

Interviews

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What are Software Demos?

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

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How the Client will Score & Award

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What are Software Demos?

RFP

Request for Proposal

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Information Technology (IT)
Software Implementation Template

RFP Number: #####
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1. Statement of Work
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Demo Expectations Go Here

How the Client will Score & Award

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3 Types

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3 Types of Demos

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3 Types of Demos

1) Traditional


“Goodie Bags”

1) Traditional Demos

- **Essentially an open timeslot for the vendor to showcase why/how their system is best for you.**
- **Easy, No Planning, Minimal Vendor Pushback**
- **Run by a “Professional Demo Artist”**
- **Usually <u>not</u> the actual system you are buying**

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3 Types of Demos

1) Traditional

3 Types of Demos

1) Traditional

2) Scripted

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2) Scripted Demos

2) Scripted Demos

Itemized Requirements from SOW

ID	Requirement Description	Team Member Score	Base	Custom	Roadmap
1	Ability to request work to be done				
2	Ability to capture the type of work on a work order/request including preventative maintenance, regular, emergency, etc				
3	Ability to capture characteristics of a work order such as corrective, predictive, administrative, capital, etc)				
4	Ability to capture work priority				
5	Ability to record the location/asset downtime type on a request and the number of hours including outage, load reduction, location down, no reduction				
6	Ability to record the regulatory classification on a request including safety, environmental, regular				
7	Ability to record when failure coding is required on the resulting task of the request; have system automatically require failure coding of resulting task if work type is Emergent				
8	Ability to record location and asset levels on the request				
9	Ability to record crew and backlog group on the request				
10	Ability to assign/record the planner on the request				
11	Ability to record the originating work order on the request for follow up work				
12	Ability to record adder to the priority * criticality of the request				
13	Ability to record outage code to request				
14	Ability to record other categorizations to request to filter by such as: loss prevention type, special project type, outage type				
15	Ability for criticality of location/asset to be taken into consideration for total priority (including additional adder field for planners/work week managers to bump up a priority based on matrix)				
16	Ability for system to search for duplicate work orders and requests written for location/asset and display listing of those to requestor to prevent duplicate records.				
17	Ability to identify template of how data is to be entered into text field (for example description of work must include: physical location, specific equipment, what, where, when, severity, as found/as left and any known/possible implications of equipment issue.				
18	Ability for accounting information to be pulled from location listed				
19	Ability to enter a deficiency tag number on the work request/work order to reference a physical tag hanging in the field to indicate the issue has been written up.				
20	Ability to add other work categorization fields				
21	Ability to search for a work request based on work categorization/type attributes				
22	Ability to enter required by date for work to be completed and have locked down once request taken to work order				
23	Ability for user to take work request and either build a work order from it or add to an existing work order as a task				

2) Scripted Demos

Itemized Requirements from SOW

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Client selects most critical items to see in the demo

2) Scripted Demos

- Client identifies which requirements they want to see
- List provided to vendors in advance
- Often conducted by Professional Demo Artist

3 Types of Demos

1) Traditional

2) Scripted

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3 Types of Demos

1) Traditional

2) Scripted

3) Verification

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3) Verification

- **Existing product, currently in use**
  - **Not “sandbox” nor “demo” system**
- **Vendor coordinates with a similar client who is using it.**
- **Representatives from the similar client will perform the script.**

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3 Types of Demos

1) Traditional

2) Scripted

3) Verification

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Summary of Pros & Cons

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Summary

Traditional

Pros	Cons
• No planning required • Zero pushback from vendors • See the presumed strengths	• Open ended, not apples-to-apples • Vendors show only what they want • Professional Demo Artist • Not the “real” system

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Summary

Traditional

Pros

- No planning required
- Zero pushback from vendors
- See the presumed strengths

Cons

- Open ended, not apples-to-apples
- Vendors show only what they want
- Professional Demo Artist
- Not the “real” system

Scripted

- Easy to plan
- Little pushback from vendors
- See what’s on your “shopping list”

- Demo may be run like a “checklist”
- Professional Demo Artist
- Not the “real” system

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Summary

Traditional

Pros

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- Easy to plan
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- See what’s on your “shopping list”

- Demo may be run like a “checklist”
- Professional Demo Artist
- Not the “real” system

Verification

- See what is on your “shopping list”
- Actual, real, working system
- Minimize the Demo Artist
- Simultaneous Reference Check

- Extreme vendor pushback
- Increased coordination

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Tips for Success

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Other Challenges with Demos

- Vendors already established strong "relationships" pre-RFP
- Evaluators "doing their own research"
- Vendors pushing back against demo requirements
- And many, many more

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Approaching Demos (verifications!) for Success:

- Pre-educate the vendors. Multiple times! It is worth it!
- Keep it short. 1 to 1½ hours maximum.
- Conduct interviews in parallel with implementation team
  - Need a streamlined & reliable approach to the RFP and Evaluations to make this happen!
  - Need multiple pre-education sessions to explain to vendors!

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Why conduct interviews in parallel?

- **Imagine: You are looking to purchase a vehicle & driver**

Why conduct interviews in parallel?

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Solid Verification = Sweet Ride!

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vodafone

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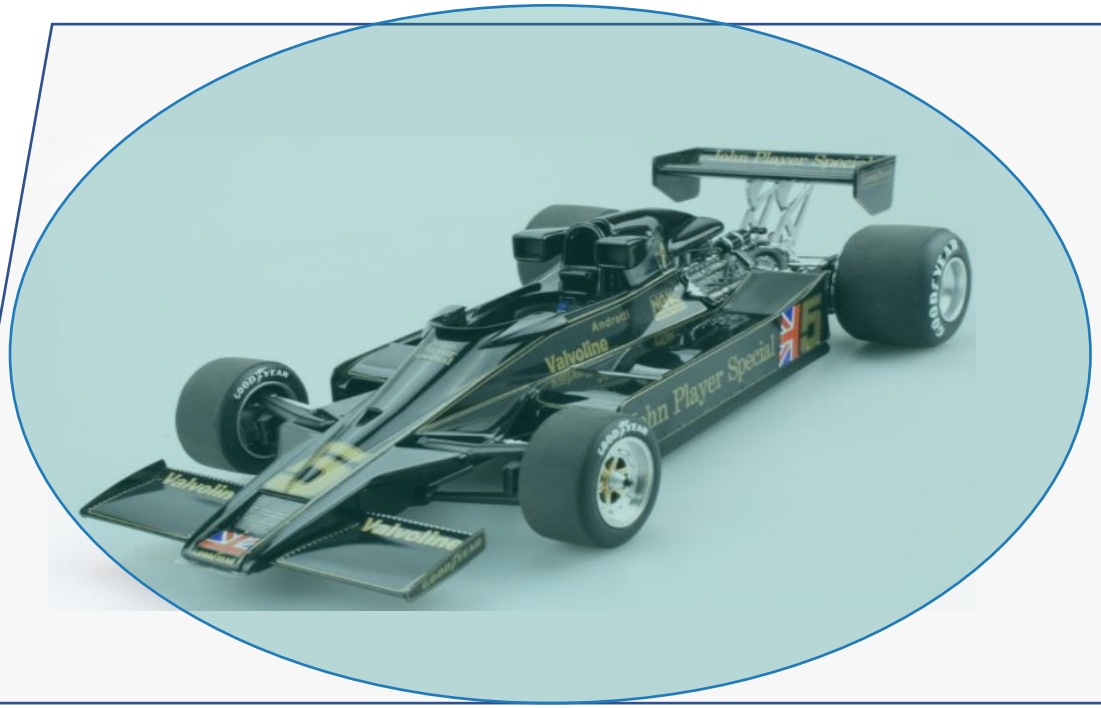

Solid Verification = Sweet Ride!

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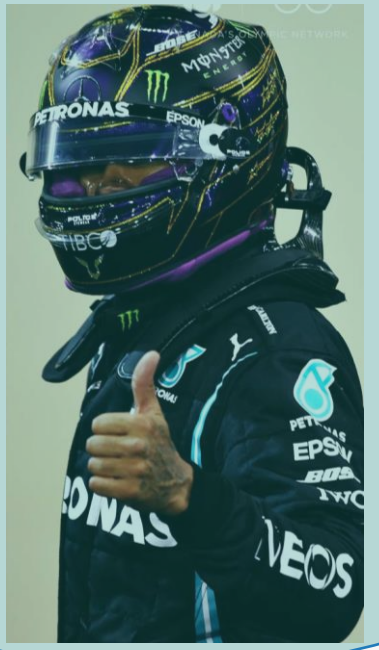

Solid Interviews = Right Driver!

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Summary

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FREE Online Course! 10 PDH

Now: Oct 17, 24, 31, Nov 1

2025 x 3 times
(Jan, May, Aug)

NASPO™
National Association of State Procurement Officials

Procurement®

Better RFPs = Better Projects

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

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/
  - or Email Amy: amy@center4procurement.org
- Open to all (even non-members of NASPO)

NEWer Courses by CPE + NASPO

Look for these courses on…

- The 1, 2, 3's of a Great Scoring Matrix (2025x2 = Feb, Oct)
  - Session #1: Creating an Evaluation Matrix [90min]
  - Session #2: Complexities of Real-World Scenarios [90min]

- Deep Dive on Effective Evaluations (2025 x2 = Mar, Oct)
  - Session #1: Planning Your Evaluation Strategy [90min]
  - Session #2: Training Your Evaluators [90min]
  - Session #3: Strategies for the Negotiation Phase [90min]

Free Webinar Series!

3rd Thursdays monthly
@ 12pm Central

15min Teaching Moment

(learn a new tip, trick, or tool)

20min Virtual Peer Group

(network with other procurement professionals)

5min Announcements & Opportunities

(upcoming courses & other ways to get involved)

Office Hours

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

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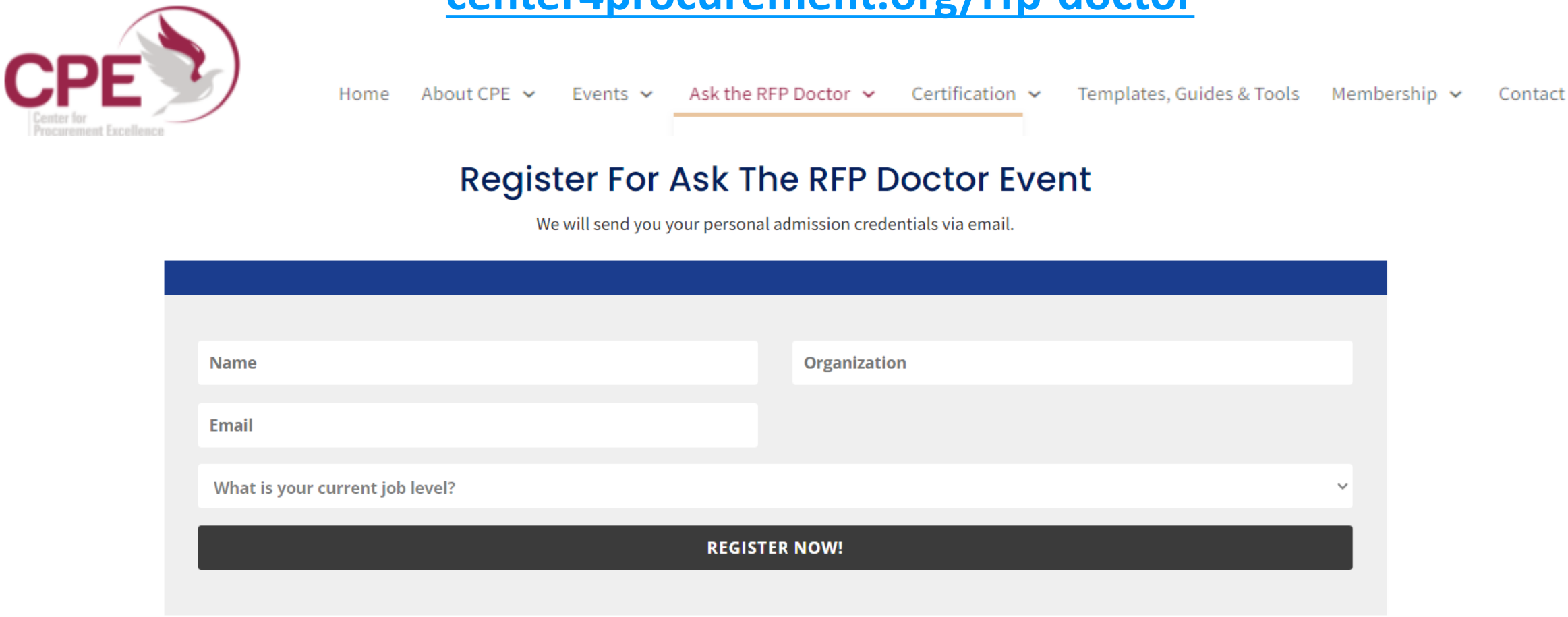
ASK the RFP Doctor

center4procurement.org/rfp-doctor

Invite your Friends!

center4procurement.org/rfp-doctor



RFP Doctor Sign-up (FREE)

Previous Recordings Available Online!

center4procurement.org

Previous Recordings Online!

@

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Home | About CPE | Events | Ask the RFP Doctor | Certification | Templates, Guides & Tools | Membership | Contact

Teaching Moment Archive
Videos

JOIN US FOR OUR NEW WEB SERIES

The Center for Procurement Excellence is pleased to announce a free new interactive web series, "Ask of the RFP Doctor". In this first-of-its-kind virtual discussion, procurement experts provide practical advice in addressing today's purchasing, supply chain, and acquisition challenges. Here's how it works:

- **Teaching Moment (15 minutes):** the RFP Doctor will kick things off with a brief presentation targeted at a specific topic
- **CPE Virtual Peer Group (30 minutes):** next, we will split up into small groups and give attendees an opportunity to network with each other and have a discussion on a relevant topic. **Learn More**
- **Ask the RFP Doctor – Office Hours (15 minutes or until the questions run out!):** we'll come back together for an open Q&A session. Have a challenging RFP ahead? Have a unique situation? Bring your questions and let's get it figured out!

Third Thursdays of every month starting at 12:00pm Central

TEACHING MOMENT ARCHIVE VIDEOS

NEW RESOURCE – CEU Hours!!!

- CPE is pleased to announce that all attendees @ live “Ask the RFP Doctor” events will receive 1 hr Continuing Education Unit (CEU)!


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Continuing Education Unit
(1.0 hour)

CPE is pleased
to award this certificate to

Jake Smithwick

for Attendance at the Ask the RFP Doctor Event:
"Setting Realistic Procurement Schedules"

2/15/2024
Date awarded

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ASK the RFP Doctor

Jake Smithwick, PhD, MPA
Director of Education, CPE

Key Learning Points

- IT projects are EXTREMELY risk and difficult!
- Out of all of the project types, IT is the one where we need to be on our "Procurement A-Game"
  - Fair, Open, Transparent, Value, Integrity
- Put together a good SOW
- And finally… organizational change should be synonymous with IT projects!

Jake.Smithwick@charlotte.edu

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