RFI document

[Once you have decided that you have a business problem, you have a budget and ownership and that consultants are the best way to solve this problem, you will need to pull a team together to write an Request For Information. By the time it goes out you should have a clear idea about how you are going to score the responses and create a short list. Because the Request for Proposal comes after this, you do not need to know exactly what you want at this stage, nor do you need to discuss costs. Nor does an RFI commit you to any further action. A template for an RFI, is detailed below.]

ABC Client Ltd.

Request for Information: [Project Name]

[Current Date]

Responses Due: [Target Date]

Submit to: [Name & Address or Email]

1. Statement of Intent

This document seeks to solicit information from qualified consultants to [provide high level description of project]. The information provided in response to this document will help [insert name of company] help short-list a consultant, or consultants, to provide services to [support / implement / develop] this project.

The document is confidential and may not be shared with other parties unless permission is granted from [insert name of company].

[You may also wish to include details about who may respond to the RFI - are you sending it out to a limited group?]

2. How to Respond

[This is the procedure for where to send the document, what address / email / name, who to contact re: queries and any other information about how the process is handled. Also remember to specify the number of copies you require.]

3. Client

a. Client background

[Provide some basic information about the client organisation, the strategic environment and the competition. This will allow the consultants to get a brief overview of the company and what it is about you that you believe is distinctive.]

b. Client sub-group background

[Provide some information, if about the purpose, objectives and structures of the sub-group within the organisation. This will provide the consultants with an idea of why the work should be done and what purpose it will fulfil.]

c. Terminology

[If this is a technical project, you may wish to explain acronyms, abbreviations and other company-specific labels. You may wish to do this later in the RFI.]

4. Project

a. Project background

[Provide details about the business requirement for the project. What 'problem' is it trying to solve? What opportunity it trying to exploit? It can help to detail the business or technical problems you are trying to solve. This should be the largest section of the RFI. Involve as many people as possible in your firm when writing this section. However, ensure that, in most cases, you do not specify a solution - this is a job for the consultants!

b. Project scope

[what will be in scope for the consultancy project? What does your own company wish to do? Who will manage the project? What other stakeholders will there be? At this stage, you may wish to keep this high level, as the consultancies may have a good idea about what the scope of these projects *should* be and you may wish to hear their ideas.]

c. Requirements

[You may not have specified detailed requirements at this stage but it is important to give the consultancy some idea of what you are looking for in terms of a solution. I find that scenarios are a good way to provide a high level illustration of what you need.

d. Scope

[what will be in scope for the consultancy project? What does your own company wish to do? Who will manage the project? What other stakeholders will there be? At this stage, you may wish to keep this high level, as the consultancies may have a good idea about what the scope of these projects *should* be and you may wish to hear their ideas.]

e. Time-lines

[what are the timelines for the project? Does it need to be completed by a fixed date? You may leave this out or keep it high level if appropriate.]

5. Responses

a. Information required

[What format the responses should take: headings, information required, length, format, how you want it bound, whether you want an executive summary and a table of contents, and house rules on presentation. Some clients provide a template for the RFI.]

[Your information requirements may include: work plan, staff, experience in this area, daily pricing, references, size, professional accreditations etc… try only to include information that will actually be useful to you in making up your mind. Some RFIs waste a lot of time and space asking for information that really isn't useful.]

b. Selection criteria

[Provide a high level summary of how responses will be short-listed.]

c. Time-lines

[What are the key dates in providing responses and any other notable milestones? You may wish to put in a deadline for any questions that may be asked.]

6. Disclaimer

[Your legal department will often add a disclaimer stating that this document does not make the company liable for anything, including employing anyone to do the work and that the consultancy will not be paid or reimbursed for producing the response.]