



**PARSONS** | TKO

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## Welcome

- All participants' microphones have been muted & cameras have been turned off
- Please post any questions using the Q&A function and share any comments in the chat
- This webinar is being recorded & will be distributed after the session
- Live captions are available in your Zoom meeting controls toolbar

PARSONS | TKO



# Navigating your next technology investment

How to streamline your selection process

July 19, 2023

# Meet our panelists



**Nate Parsons**

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Chief Strategy Officer  
ParsonsTKO



**Alfredo Ramirez**

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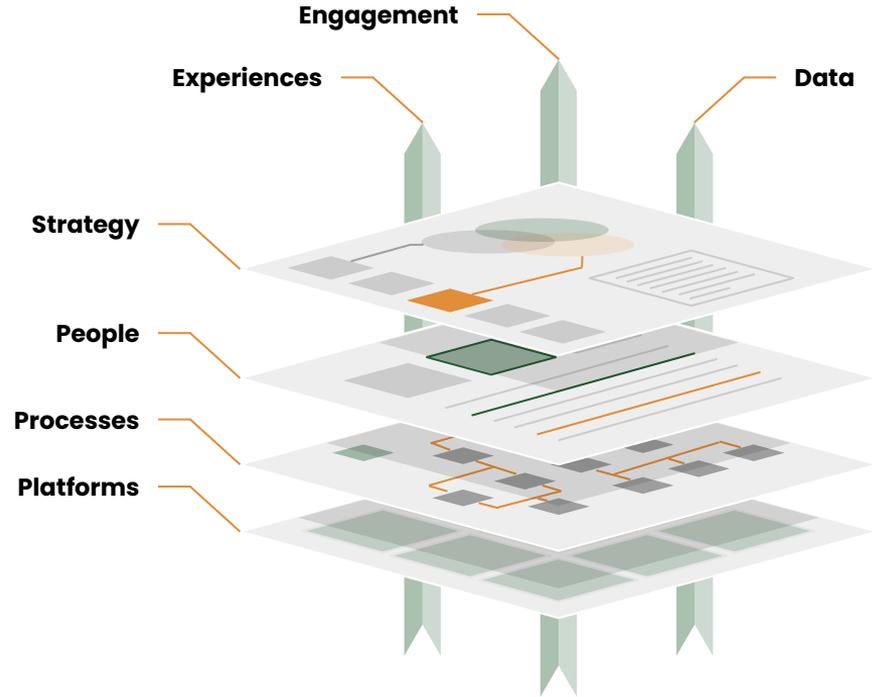
Chief Operating Officer  
Prosal.io

# The way we see possibilities

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*Engagement Architecture* ♦ noun

The ParsonsTKO philosophy and methodology that addresses your outreach platform as a holistic ecosystem—an interconnected set of people and systems that work together to advance your mission.



# Unwrapping the RFP process

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## PLANNING

Getting your organization ready for change

## SELECTION

Finding your implementation partner

## ONBOARDING

Setting up your partner for success

# Planning – Key gears

## Schedule Risks

What can you do now to minimize turnaround times during the project later? How can you set internal expectations for the time and energy required?

## Cost Risks

Which business functions will be impacted? Which will need to be reimaged? How can you prepare for having better ideas half way through the process?

## Scope of Work

What are you asking for beyond a software solution? Data migration, business process changes and analytics changes all should be considered.



## Internal Events

When are your different stakeholders busy periods? What known outages are you routing around? When is change management best done?

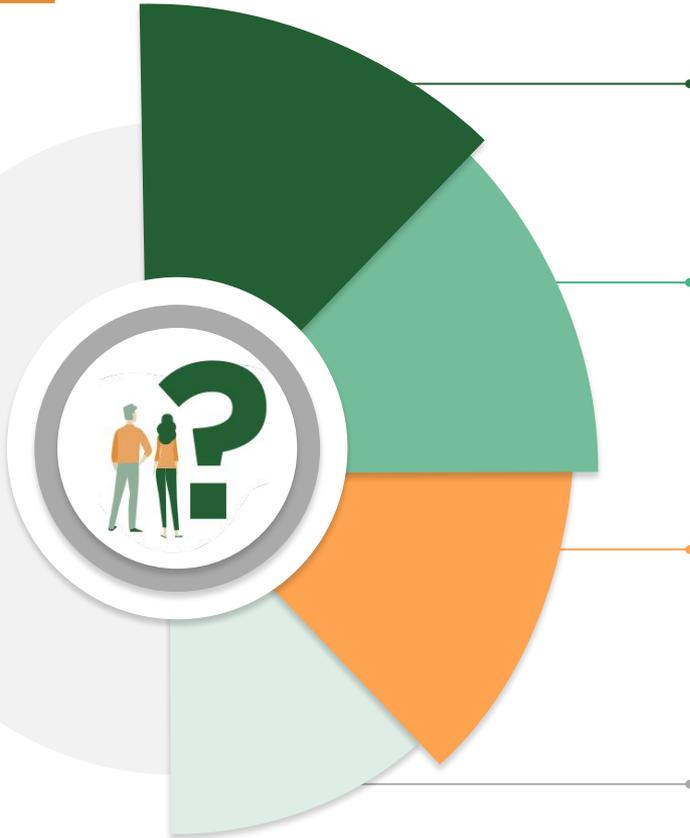
## Vendor Incentive

How can you make this project attractive to the right partners? Is your RFP response process in line with the value of the work to them?

## Budgeting

- Main implementation
- Good ideas
- Contingency.
- Adoption & onboarding

# Planning - Tyranny of the clock



What conversations do you want, or need, to have "**off the clock**?" Once the RFP is publicly announced you will be on a regimented timeline.

Do you need an implementation expert OR a consultant OR both? What **business process** changes are you looking to make?

Are you shopping for an **opinionated solution** that defines how internal processes work (such as processing small dollar donations) OR a **toolbox** to build your process into?

What metrics are you going to use to **measure changes** (good and bad)?

# Onboarding – Improved partnership

01

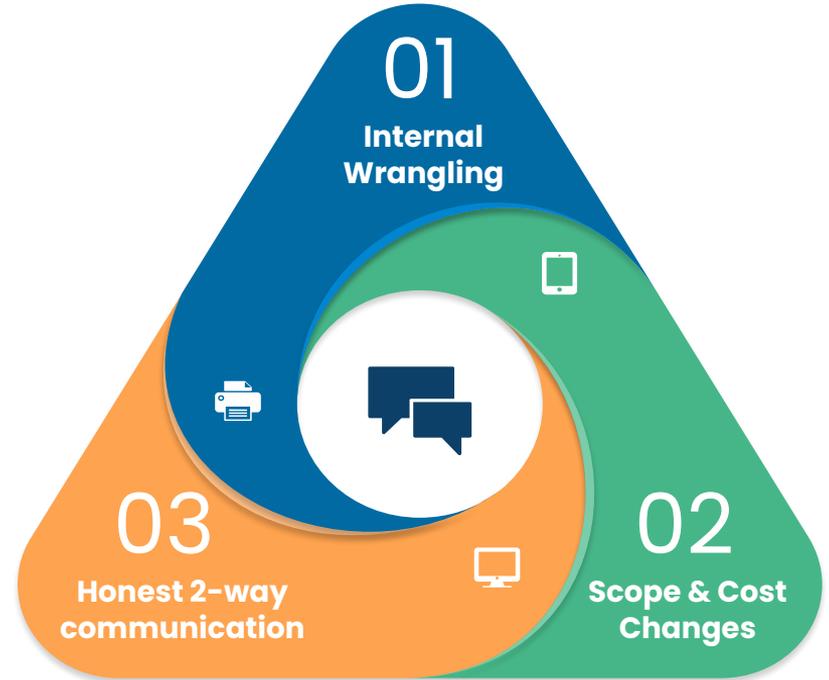
- Scheduling executive reviews proactively
- “Good enough” decision making authority
- Setting up internal feedback loops

02

- Identifying **open & closed design** questions
- Managing “wouldn’t it be cool” suggestions
- Asking for “**ugly, fine, and great**” solutions

03

- Making sure “**harder than expected**” is on the agenda
- Honoring decision making windows and documenting delays on BOTH sides
- Educating your partner on **your internal politics**



# RFPs are a work product

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- *Desired organizational change*
  - **Requirements**
- *Measurements & KPIs*
  - **Objectives**
- *Peer experiences & ROI*
  - **Budget**
- *Internal change management needs*
  - **Timeline**

The RFP process is here



Budget Allocation



Development



# You know you're on the right track when...

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*Common gotchas, warning  
signs, and best practices*

# RFPs can be challenging, because...

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01

We are not experts at everything

02

We focus on solutions, not problems

03

We are way too optimistic about the future

04

A poor RFP can lead to a bad project or outcome

# Put yourself in the respondent's shoes

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*What are some reasons they would skip an RFP*

- **Rigidity** inhibits creative and divergent problem solving
- **Lack of information or clarity** prevent good proposal creation (**budgets!**)
- Your **network** isn't always as diverse, active, or large as you think it is
- **Past RFP experiences** influence current RFP practices

**RFP  
respondents  
are not mind  
readers!**

# Warning signs of a poor RFP process

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- No internal requirement-gathering or pre-RFP information
- RFP includes too much or too little info
- The original RFP timeline has been pushed out or extended
- Unclear evaluation process
- Doesn't include budget
- No process to answer questions or engage with vendors



# Keep these 5 things in mind

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1. ***Use a realistic timeline***

It's going to take a few weeks, if not months to run your whole RFP process

2. ***Consider researching who to invite to participate***

Are you really going to review 45 proposals?

3. ***Include the right information in your RFP***

Issues, objectives, selection criteria, and budget need to be in there

4. ***Ask vendors to provide reasonable detail and a draft project timeline***

You need a clear picture of their product or service

5. ***Don't get hung up on proposal format***

Give participating vendors the ability to use their proposal template

# Want an RFP Checklist?

*Check the link in the chat*

- Include a budget or ballpark range
- Share the RFP outside your network (Prosal!)
- Include availability and a point of contact
- Offer a clear and reasonable timeline
- Call out any incumbents or past support
- Note DEI statement or position in RFP solicit
- What do you expect in the proposal?
- What do you wish to accomplish?
- What is the final deliverable(s) from the project?





# Questions?

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- How do I?
- But what about X?
- My org has this challenge...

# RFP Office Hours

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[Join Nate's office hours](#)

nate@parsonstko.com



[Meet Alfredo](#)

alfredo@prosal.io



# P|TKO Please, take our free content

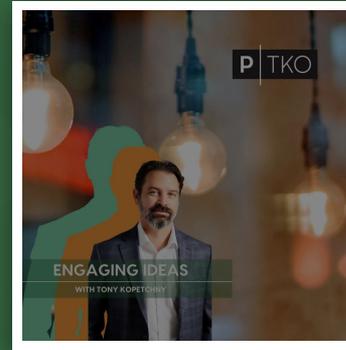
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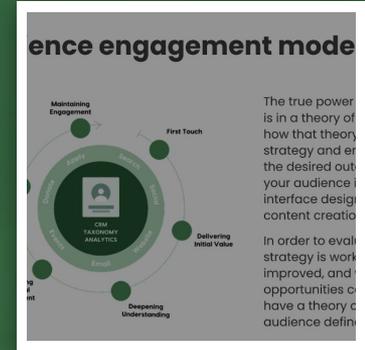
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Describe your project