

SAM Tools Guide: How to write a Request for Proposal (RFP)

Pave the way for a successful SAM tool implementation

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Introduction

If you are reading this buyers guide, most likely your company is seeking out a Software Asset Management (SAM) solution. The IT market has many SAM vendors, and each brings unique value. A structured Request for Proposal (RFP) initiative is essential to choose the right tool from this large pool.

This guidebook gives you best practices for conducting an RFP initiative.

You will learn how to:

- **Plan the initiative internally** by defining the company's objectives, proof points, and internal RFP team.
- **Prepare the RFP invitation** to the long-listed vendors, including a project overview and submission schedule.
- **Write a requirements document** that accurately covers all topics from major to minor and non-functional to functional.
- **Compare the RFP offers** with established KPIs such as a numeric scoring system to effectively shortlist the vendors.
- **Go beyond the RFP** with vendor presentations to ensure the solutions you evaluate will meet your company's current business needs and future growth strategy.

Please note: We have intentionally left out administrative topics as they will vary from company to company such as legal provisions and contact information. We don't discuss organizational challenges that you might encounter in procurement, implementation or related change processes. Excited about your journey to a successful SAM solution? We certainly are! Let's get started together.

Get started with a template!

Want an RFP shortcut? We created a real-life "live" RFP template just for you. This Excel spreadsheet has a deep list of questions that we've gathered over years of answering RFPs from the vendor side.

We've learned from prospects and customers what the success criteria should be. Use the document as a starting point and change what is meaningful to you, or consider these requirements as close to complete.

Get it now!

Plan the RFP Initiative

Your management has given the go-ahead for a professional SAM solution. The procurement department or sourcing team told you to run an RFP in order to choose the vendor. Where do you start? Let's look at the basics such as objectives and reasons for this initiative and putting together the internal RFP team.

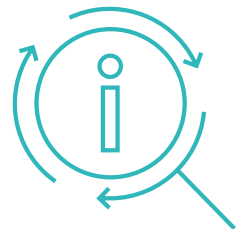
Define the objectives & scope

Before any work on the RFP offer, it's important to internally define the objectives for rolling out a new SAM solution. These goals and milestones will be the foundation for writing requirements for the RFP and eventually selecting the potential vendors. Your objectives might include:

- Benefits to gain, such as IT maturity, data quality, reduced costs, stronger staffing, employee satisfaction, or reduced risk. Assign monetary terms, if applicable.
- Current weak points to eliminate, using similar criteria as above.
- Processes that should be automated as much as possible.
- Processes that must be supported by the new tool as soon as it goes live.
- What additional processes would you like to implement in the near future, perhaps 2 to 3 years?
- Is there a larger IT footprint, such as connecting to the interfaces of third-party systems or assisting ticket requests for IT Service Management?
- Are there plans for long-term strategy, such as staged implementation across the many regions of a global company?

It's also important to define the scope around running the RFP initiative, which might include:

- Who is the internal customer? Which departments will use the new tool?
- Who are the stakeholders? Which teams and people are actively involved in the selection?
- How large is the available budget? How much does cost affect your final decision?
- What is the rough timetable of events, from invitation to decision? (see section **Schedule of events**)



Consider reasons & proof points

Consider why you are looking for a professional SAM solution, as seeing these proof points might impact the requirements in your RFP.

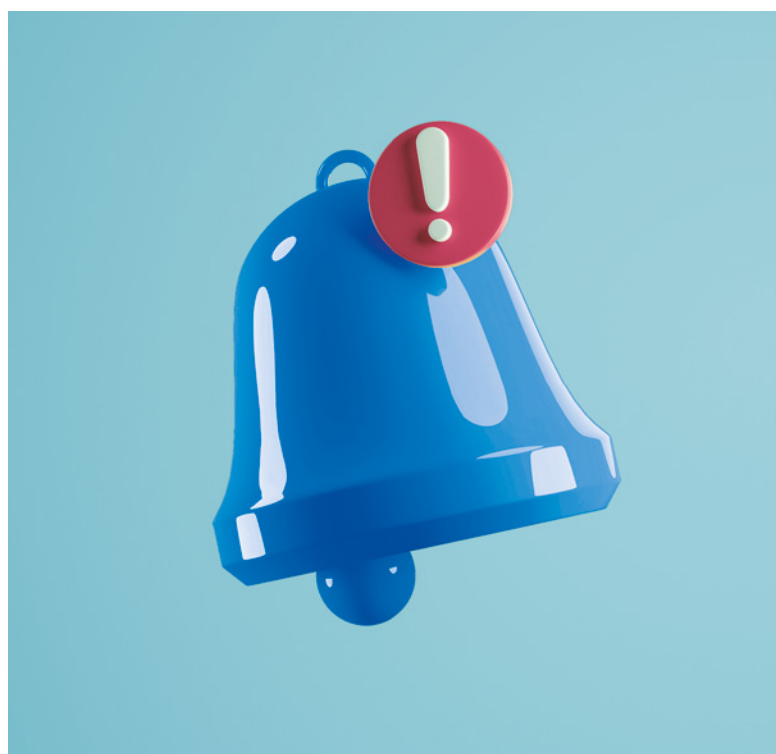
For instance, if you are replacing a homegrown tool, you'll want to know how that historical data can be imported into the new solution. If you're starting the SAM program from scratch, you will need to understand how your "raw" data can be structured and moved most efficiently.

Reasons to implement your first SAM solution might include:

- Your company is going through a growth period and is ready to invest in this important area of software cost control.
- Your company went through a merger or acquisition and now manages a larger software environment.
- Your company has always lacked a dedicated SAM tool and has fully outgrown basic methods such as Excel and Word.
- Your company has built their own "home-grown" tools but that functionality is no longer manageable for your increasing needs.

Reasons to replace your current SAM solution might include:

- The technology no longer meets your functional requirements, and the cost and effort are too high to adapt and update it.
- Maintenance for the tool is about to end and will no longer be supported by the vendor.
- The experienced people required to run it are not available internally, and it will be expensive to bring in outside professionals.
- The tool has been tailored extensively to individual requirements over the years and is far removed from the original standard, which means the cost and effort of migrating to a new version is on a similar scale to rolling out a completely new solution.



Choose the internal team

Who should be involved in the RFP process? It's a commitment that will require months of participation, which might include the following activities:

- Draft and coordinate the questions about requirements.
- Review the responses from the long list of vendors, compare the answers against each other, and give feedback and an evaluation.
(see section **Compare RFP offers**)
- Attend presentations and technical demos by the short list of vendors.
(see section **Schedule vendor presentations**)
- Participate in the final decision making process.

Here is a helpful way to proceed

Choose a document leader. You should designate one person to own the RFP document. This includes putting all requirements into a single draft, making sure each stakeholder is accomplishing their tasks, and ensuring there is a consistent writing style and overall flow.

Split topics between stakeholders. The requirement topics might be split across people or teams who have an area of knowledge. Make sure to gather requirements from stakeholders in departments across the company, from management to team leads to end users.

For example, a person from Vendor Management might handle the product requirements, a person from the Security team handles the security requirements, and a person from Procurement handles the financial and company questions.

Choose a vendor contact. One point of contact should handle communicating with the vendors. Often the Procurement team acts as the liaison between their company and the vendors.

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Prepare the RFP Invitation

Your internal team has chosen the initial “long list” of vendors to invite for the proposal offer. Now it’s time to contact the vendors with a description of your RFP initiative in detail. Include an explanation of the initiative, a timeline of events, the submission procedure, and engagement documents that include a detailed requirements questionnaire.

Overview of proposal

We highly recommend describing your scope in detail, so the vendor understands the project and context of your requirements. Include your current processes – or what is missing from them – so the vendor can tailor their offer and explanations to what your company and employees need.

You might include one or more documents that specify the following information:

- **Company overview**

Provide a short overview of your company, its industry, history, and goals, especially as they relate to this project.

- **Project objectives**

Give a concise overview of your objectives. You might describe the type of technology you’re looking for, the goals to achieve, and an outlook of rollout stages if that is applicable.

- **Scope of usage**

Explain the extent to which the tool will be used. Important details might include the number of end users, their admin or non-admin roles, and the assets to be managed.

- **Scope of services**

Specify the services that might be required. Such as software licenses, installation, customization, training, operations monitoring, and managed support. Explain if you initially want a limited scope of services and plan to extend the solution later.

- **Requirements document**

This is the detailed proposal document for the vendor to complete. (see section “Write the Requirements Document”)

- **Submission process**

Explain the deadlines for submitting questions about the RFP document, final submission of the RFP offer, and expectations for when decisions will be made. (see section below “Schedule of events”)

Please note: This guidebook does not include advice about legal language, and your overview should provide more guidance and explanation than our example on the next page. Thank you for noticing and adjusting this text!

Here is a concise example:

"At [Company], our growth strategy is to increase sales and profits by investing in the business and investing in base products and acquiring leading brands to meet our business goals and consistently deliver shareholder value. As part of an overall IT Asset Management initiative, [Company] is seeking a software asset management system that will support the business as a key component. The selected provider will work together with [Company] to advance our SAM journey to minimize [Company]'s risk and optimize our software portfolio.

"[Company] is seeking an enterprise solution that provides functionality to address a wide range of critical use cases and capabilities. The chosen solution will manage a broad software portfolio of both on-premises and SaaS systems such as manufacturing, ERP, analytics and retail execution. We intend to integrate the chosen solution with an MSP already in place that provisions software to end users. As a later stage of this program, we would like to explore charge back or show-back for software purchases through the use of the chosen solution.

"[Company] employee headcount worldwide is approximately 12,400. Major end-user software installations are Microsoft (Teams, Office 365 E5 and F3), Adobe, and Autodesk. [Company] has a data center with several thousand VMs, several hundred hosts, and multiple regional vCenters with significant infrastructure in Oracle DB, VMWare, and Azure.

"[Company] has only minimal staff to contribute to a SAM program, so significant change management, education and process workstreams will need to be addressed with the solution implementation. The chosen solution provider will be required to work with multiple service providers who are responsible for different parts of [Company]'s environment such as ITSM, hardware, and software support."



Schedule of events

After the invitations to submit an RFP document have been sent, there are standard milestones to hit, each with a specified time period. Typically there is a period of 1 to 2 weeks for the vendors to submit their questions about the RFP requirements, and then a 2- to-4 week period to submit their RFP offer.

Here is an example of a schedule of events:

Event Milestone	Who	Who	Time Allotted
Release RFP	Company	June 14	
Intent to Bid	Vendor	June 16	2 days
Submission of RFP Questions	Vendor	June 23	1 week
Return of RFP Clarifications	Company	June 30	1 week
RFP Due	Vendor	July 13, 5pm EST	2 weeks

01 | Release to Bid – Your internal team will notify the vendors of the RFP invitation. You will specify the communication channels, which might be a dedicated email address or a vendor portal. Often the Procurement team is the established point of contact.

02 | Intent to Bid – The vendor is given a short deadline to notify your company of their intent to participate in the RFP. They should specify their point of contact for the RFP process.

03 | Submission of RFP Questions – The vendor is given 1 or 2 weeks to ask questions about the RFP scope, evaluation process, or proposal requirements. Typically these questions must be sent in one submission through the point of contact. After this period, no questions are allowed. For example, a vendor question might be, “You asked about Oracle capabilities. Is that because you have a large Oracle estate? Or are you planning to onboard Oracle in the near future?”

04 | Return of RFP Clarifications – Your internal team will provide answers to the vendor questions, either directly to that vendor or distributed as a full Q&A to all participating vendors.

05 | RFP Due Date – The deadline for a vendor to submit their RFP offer, typically specified by day, time and a list of all deliverables required.

Often there are internal processes to decide for the proposal, such as:

- **Is a portal required?** Before you send out the RFP invitations, determine internally whether your company requires a portal for the SAM vendors to respond through. If you are a large private company or in the public sector, vendor purchasing is often owned by your central Procurement department. They might have a dedicated ERP platform to ensure consistent control of the process.
- **Include template for questions?** Along with the proposal invitation, you might include a template document for the vendor Q&A. The template should require the vendor to indicate the requirement and section in the RFP document to which each question relates. This process will assist your internal team in collecting and answering all questions from all vendors in one document.
- **Maintain anonymity of vendors.** An important aspect throughout the proposal process is putting safeguards in place to ensure the competition is not disclosed. A primary task includes keeping the names of vendors out of any external communication and documentation.



Write the Requirements Document

To shortlist the long list of vendors, you will send a detailed document of key requirements that include both high-level and in-depth questions, and functional and non-functional requirements. Let's examine how you might write this RFP document in terms of structure, format, and the content itself.

Choose the file format

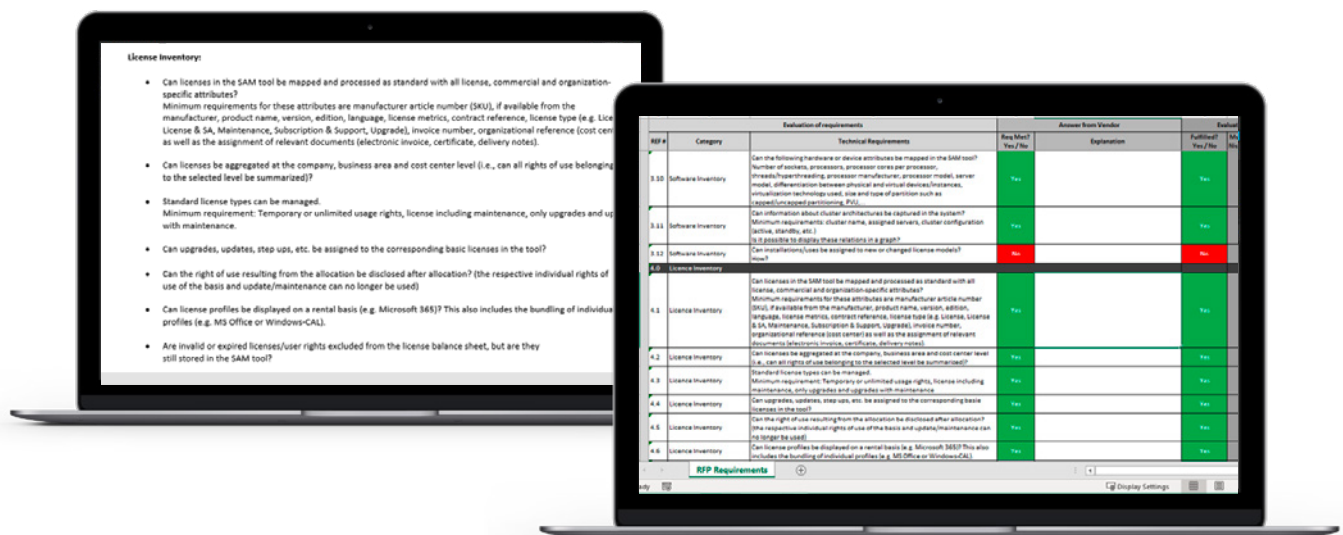
The requirements document might be delivered as an Excel spreadsheet or a Word document. It is not advisable to send as a PDF document because that file format doesn't easily capture long-form answers.

Microsoft Word document

This simple information structure is split into sections with tables, text headers, and bullet points. The Word document can have a Table of Contents at the beginning, or use style sheets to display sections in the Navigation Pane, or rely on a combination for navigation and clarity.

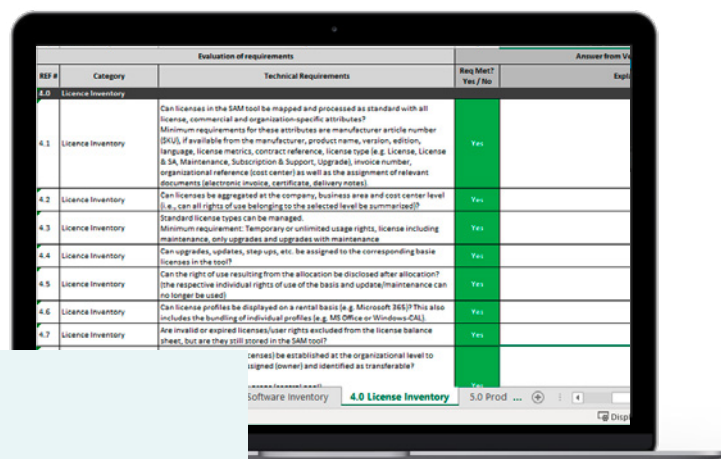
Excel spreadsheet with one sheet

This information structure is split into columns of questions and answers which are clearly marked with topic headers. You can flow the information for all topics in a single long sheet. And you can add columns to use for internal feedback about the vendors' responses. (See section [Compare RFP Offers](#))



Excel spreadsheet with tabbed sheets

Alternately, the information in an Excel spreadsheet can be divided into separate tabs, with one topic per sheet. We recommend using this structure because it is helpful for people in both the internal RFP team and the vendor team to split up the topics or questions that are assigned to them.



RFP #	Category	Evaluation of requirements		Answer from Vendor
		Technical Requirements	Req Met? Yes / No	
4.1	License Inventory	Can licenses in the SAM tool be mapped and processed as standard with all license, commercial and organization-specific attributes?	Yes	
4.2	License Inventory	Can licenses be assigned at the company, business area and cost center level (i.e., can all rights of use belonging to the selected level be summarized)?	Yes	
4.3	License Inventory	Standard license types can be managed. Minimum requirement: Temporary or unlimited usage rights, license including maintenance, only upgrades and upgrades with maintenance	Yes	
4.4	License Inventory	Can upgrades, updates, step-ups, etc. be assigned to the corresponding basic licenses in the tool?	Yes	
4.5	License Inventory	Can the rights of use resulting from the allocation be disclosed after allocation? (the respective individual rights of use of the basis and update/maintenance can no longer be used)	Yes	
4.6	License Inventory	Can license profiles be displayed on a rental basis (e.g. Microsoft 365)? This also includes the bundling of individual profiles (e.g. MS Office or Windows-CAL)	Yes	
4.7	License Inventory	Are invalid or expired licenses/user rights excluded from the license balance sheet, but are they still processed in the SAM tool?	Yes	
		Can licenses be established at the organizational level to signed (owner) and identified as transferable?	Yes	

Like this tabbed Excel spreadsheet?

Use it as your RFP template! The Excel spreadsheet was created just for you. It has a deep list of requirements that we've gathered over years of answering RFPs from the vendor side, and learning from prospects and customers what the success criteria should be. Use the document as a starting point and change what is meaningful to you, or consider these requirements as close to complete. [Get it now!](#)

Structure the questions

The requirements are about technology and services, but the questions and answers are consumed by people in both parties. Think about how to present them in the clearest way.

In your internal team, you will likely assign people to specific sections, both for writing the questions and reviewing the answers. You want the team member to work efficiently and quickly. And if the vendor understands the questions with minimal assistance, this also improves your team's efficiency.

Yes/No questions. These questions make everyone's participation more efficient. Be cautious of including too many Yes/Nos, however, because the vendor will choose "yes" whenever possible if no explanation is required.

Long-form questions. Structure your questions to ask, "Please explain how you do this" or "Give an example of this." This makes the vendor think about their response and formulate a full answer they have to type in or attach a document that explains the information.

Simple vs compound questions. Do you break a topic into multiple short questions? Or do you write a longer compound question? This is partly a decision about writing style but it does affect clarity.

Require unique answers. You might state in the project scope, "Answers must be unique for every line item" or "No referencing back to other answers." This tells the vendor they can't copy/paste answers or write "See answer to question #" or "Answer continued in questions # and #." From the vendor side, it's effective to write a long answer to one question, then point other questions to that answer. But this might require your team members to jump between sections in order to fully understand an answer. (See section "Choose the internal team")

Find a Q&A balance. On behalf of all vendors everywhere, don't make every question require a long-form answer. This is a huge barrier to getting a thoughtful accurate response. It's powerful to ask, "Explain how your solution does Microsoft SQL licensing" but it's also effective to directly ask "Does the solution find Microsoft SQL Server compliance (Yes/No)" and "Does the solution follow Microsoft SQL Server maintenance (Yes/No)."

Construct the requirements

The proposal questions can typically be grouped into the categories shown below. The technical requirements will primarily fall into the categories of functional or non-functional.

Company overview. Gives the opportunity to learn about the history, philosophy, and health of the vendor, including customer information such as case studies.

For example, “What is your company’s retention rate for accounts/clients?” or “How many years has your company been providing the requested services/products?”

General information. Covers business objectives and needs such as stakeholder reporting, change requests, and solution operations.

For example, “Does your application include standard reports for compliance reports that can be used without further configuration?” or “What are your best practices for a standard rollout concept and integration of your SAM tool?”

Functional requirements. Specifies what the SAM solution should do. Typically, a functional requirement is a behavior or function of the software system when certain conditions are met.

For example, “Can all relevant license objects be displayed or assigned at different legal/organizational levels?” or “Are downgrade paths for publishers already included in the standard scope of delivery?”

Non-functional requirements. Specifies how the SAM solution works, which is important for usability and user experience. Typically, a non-functional requirement defines how the software system should behave and what limits there are on the functional requirements.

For example, “Is the product intuitive from a user perspective, such as allows for automation so minimal manual effort is required?” or “Is the data easily accessed for robust report and query generation without the need for a programming specialist?”

Services and training. Asks about customer support and best practices regarding training methodologies, support materials and personnel resourcing.

For example, “Which services in your portfolio can you deliver fully from your side without a partner network?” or “Do you provide full training across personas such as admins and end users?”

Find the functionality balance

You don’t need to mark the requirements in your RFP offer document using the categories shown above. But it’s powerful to know how they affect your evaluation of each SAM solution and your overall initiative for professionally managing IT assets.

Your project will be most successful if there is a comprehensive and balanced collection of both the functional and non-functional requirements. On your internal RFP team, some stakeholders will be most interested in the non-functional requirements, especially when the buyer of the solution is not also the user of the solution.



Compare RFP Offers

Now it's time to compare the vendors in the long list and narrow them down to a short list. You might start with 10 vendors and short-list to two or three. We recommend three key performance indicators (KPIs) to review and score each vendor once you have received their completed RFP: "Fulfilled," "Need/Nice to Have," and a numeric scoring system.

KPI: Fulfilled or Not Fulfilled

This initial KPI boils down to a straightforward Yes or No. Check if the vendor's answer shows they fulfill the requirement ("Yes") or do not fulfill the requirements ("No").

The requirement might be a Yes/No choice such as "Does the solution find Microsoft SQL Server compliance?" or necessitate a long form answer such as "Explain how your solution does Microsoft SQL licensing." You should pay attention to the directness of the answer, especially in the latter example, to evaluate if the vendor answered the question as you asked it.

Evaluation Criteria			
Fulfilled? Yes / No	Must Have / Nice to Have	Rating 1 to 5	Comments
Yes	Must Have	3	
Yes	Must Have	3	
No	Must Have	0	Vendor says this functionality is part of their Q2 product roadmap.
Yes	Nice to Have	4	
Yes	Nice to Have	4	
Yes	Must Have	5	

Evaluation Criteria			
Fulfilled? Yes / No	Must Have / Nice to Have	Rating 1 to 5	Comments
Yes	Must Have	3	
Yes	Must Have	3	
No	Must Have	0	Vendor says this functionality is part of their Q2 product roadmap.
Yes	Nice to Have	4	
Yes	Nice to Have	4	
Yes	Must Have	5	

KPI: Must Have or Nice to Have

A standard key performance indicator (KPI) is "Must Have" vs "Nice to Have." You might also see this listed as "Critical" vs "Non-Critical."

The "must haves" mean, of course, the solution must perform this requirement from a functional view for the SAM initiative. The "nice haves" means the requirement is helpful though not essential. Perhaps it is relevant for a later implementation stage or there is an opportunity to build the requirement together.

These KPIs all work together to build a full story of the vendor solution. If a vendor scores "Exceeds Expectations" on many of the "Nice to Have" requirements, but scores "Meets Expectations" on most of the "Must Have" requirements – that's a balance your team needs to review and consider.

KPI: Numeric scoring system

Once you determine a requirement is met, you might use a scoring system to establish how well it is met. This is a proven method to differentiate your RFPs as they come back from the vendors.

We recommend using one of these ranges: 1 to 3, or 1 to 5, or 1 to 10.

- 1 to 3 is the simplest to coordinate but allows the least detail.
- 1 = Does not meet expectations, 2 = Does meet expectations, and 3 = Exceeds expectations.
- 1 to 5 is a solid mix of simple with detail.
1 = Does not meet expectations, 2 = Meets some expectations, 3 = Does meet expectations, 4 = Meets most expectations, and 5 = Exceeds expectations.
- 1 to 10 allows the most detail but is also the most complicated to coordinate. 1 = Does not meet, 5 = Does meet, 10 = Exceeds, and all the scores inbetween.

Which level of scoring is right for you?

The simpler the scoring, the easier it is to grade, and the easier it is to coordinate definitions across your RFP team. Our recommendation is using the 1 to 5 scale so you can clearly indicate a difference without getting too complicated.

Evaluation Criteria			
Fulfilled? Yes / No	Must Have / Nice to Have	Rating 1 to 5	Comments
Yes	Must Have	3	
Yes	Must Have	0	
		1	
		2	
No	Must Have	3	Vendor says this functionality part of their Q2 product roadmap.
		4	
Yes	Nice to Have	4	
Yes	Nice to Have	4	
Yes	Must Have	5	

Ensure “apples to apples”

Assigning a rating score to each requirement in the RFP makes it more of an apples-to-apples comparison. Otherwise you might get “lost” in reading all the responses and unable to accurately calculate the performance of each vendor.

Ensure consistency across reviews

You need to have consistency in the grading system between all your team. For instance, let’s say your requirement question is “Do you handle compliance for Oracle, Microsoft, SAP?” The vendor’s answer only refers to Oracle and Microsoft which might mean they don’t handle SAP.

On a 1 to 5 scale, each reviewer would likely score a “2” for “Meets some expectations.” On a 1 to 10 scale, there’s a bigger range to agree upon, so one reviewer could choose 2 while another reviewer chooses 4, and those numbers cause a misalignment of scoring.

You can add up those scores and see that Vendor A scored a 94 while Vendor B only scored an 88 in a section. If you mark “Exceeds expectations” for many answers by a particular vendor, then you can clearly see that vendor is a strong contender for continuing a conversation beyond the RFP.

For one team member, a “5” of 5 could mean the vendor answered the question, whereas for another team member, a 5 means the vendor gave a deep fully detailed answer.

From a team view. Determine together as a team how to assign the scoring weight. That way anyone can look at the RFP later to quickly understand the apples-to-apples comparison.

From a section view. Also assign one person to review a particular section in all the RFPs. This guarantees consistency in the scores for that section’s answers.



Tips for reviewing offers

Keep in mind that you are looking at objective measurements as well as qualitative criteria.

Look for holistic responses

Analyze the vendor's responses separate from the content itself. Do they just answer that one question each time, or take a broader view by addressing other topics in the RFP? Are they replying in a cookie cutter way? Or do they tie their answers into other questions in the RFP document, such as "Very similar to the question you asked above..."

If people answer holistically and organically, that's a sign of the character of their company and the team you might work with.

Don't expose KPIs to vendors

We advise adding these KPI sections after the RFP documents have come back from the vendors. That way the vendors can't look at the scoring weight per requirement and focus their responses on the "heaviest" questions.

If you're using an Excel spreadsheet, you can include columns in the RFP document, and hide the fields before sending the document to the vendors. When the RFP is returned, you can unhide the column.

Refer back to living document

This RFP response can be a "living" document – you don't read it once and then forget it. As you go through the sales process, when you interact with the vendor or watch their technical demo, refer back to their answers in the RFP and make sure that this information fits with what they wrote.

For instance, if your RFP asked specifically about Microsoft and SAP, but the vendor's technical demos focus on Microsoft and Oracle, their capabilities might not match what you require. Alternately they haven't spent time in reviewing their RFP answers to adjust their presentation to match your requirements, which reflects their attention and commitment to the process.



Go Beyond the RFP

The purpose of the RFP offer document is to choose the “short list” of vendors to continue forward. Once this decision is made, your team can invite each vendor for a full presentation and technical demo that goes into the details of their solution.

Create your short list

The ultimate objective at this stage is identifying the vendors you will invite to present their offer beyond the RFP response. The key criteria can only be assessed relatively and by comparison with other offers. However, assessing them is a subjective matter and will certainly give rise to discussion, especially if there are vendors who are secretly preferred by people on your internal RFP team. In cases of doubt, you can simply include one vendor more on the short list in order to avoid friction in the team.

Keep the people in mind

Do not underestimate the human aspect of your vendor selection. It's important to think through: Do you want to work with these people? Are they responsible, responsive, and even likable? You will work with them very closely for a long period of time during the implementation, and most likely beyond through managed services or planned consulting.

Another aspect is the cost of people-powered services. Total costs are ultimately a crucial factor. Can you estimate together the work required for “person” hours or FTE equivalent time such as:

- How many person days might be required for implementation of the solution.
- Level of automation vs manual work to input assets such as software contracts, employee records, and license updates. Please note: This is greatly dependent on the quality of your company's inventory and data.
- The consulting work you might require for potential customization of the technology.
- What managed services might supplement your staff operations, such as ongoing maintenance of the product library.

Schedule vendor presentations

The vendor's technical presentation of their solution might last between two hours and a whole day, which you can schedule over several days if needed. Make sure to invite key people from each of your internal departments to the appropriate events.

The purpose of staging a presentation is to:

- Get a personal impression of the company and its employees. What is their professional expertise and how do they interact with you professionally and socially?
- See how the interface looks and operates conceptually, such as whether it's attractive and intuitive. This fits with the topic of “non-functional” requirements. (see section “Types of requirements”)
- Verify the key criteria from the requirements document, including asking about any successful use cases, whether or not they were included.
- Gain insights into the company's development plans and product roadmap.
- Clarify questions that either party has regarding the offer document that was submitted.

Ask for use cases. A best practice is to ask the vendor to present specific use cases in the technical demo. These use cases should replicate the most important activities which your users will carry out later or potential scenarios related to your requirements. Talking about customer stories can help ensure that all important information is communicated and makes it easier for the vendors' presentations to be compared.

Further evaluation stages. From these presentations, you might decide to move forward with another stage of engagement, such as a paid testing phase or Proof of Concept (PoC). Keep in mind that your company or the vendor might get new information during the RFP process which requires changes to the offer.

Conclusion

This guidebook has brought you to the ultimate result of a Request for Proposal: Deciding which vendor to proceed with and entering into contract negotiation to bring on their solution and services.

By reviewing the offers, presentations, and applicable stages such as testing, you will identify the Software Asset Management vendor with the best financial value for the scope and requirements of your initiative.

Once your contract is final, don't forget to officially close the RFP and inform the other vendors of the outcome. You're not required to provide feedback about the reasons behind your decision but doing so is a great method for maintaining those relationships, and helping the vendor to understand their strengths and weaknesses.

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Learn how the USU solution works for your long-term SAM success, and helps as trusted advisor.

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