

RFP Workflow

SWETS

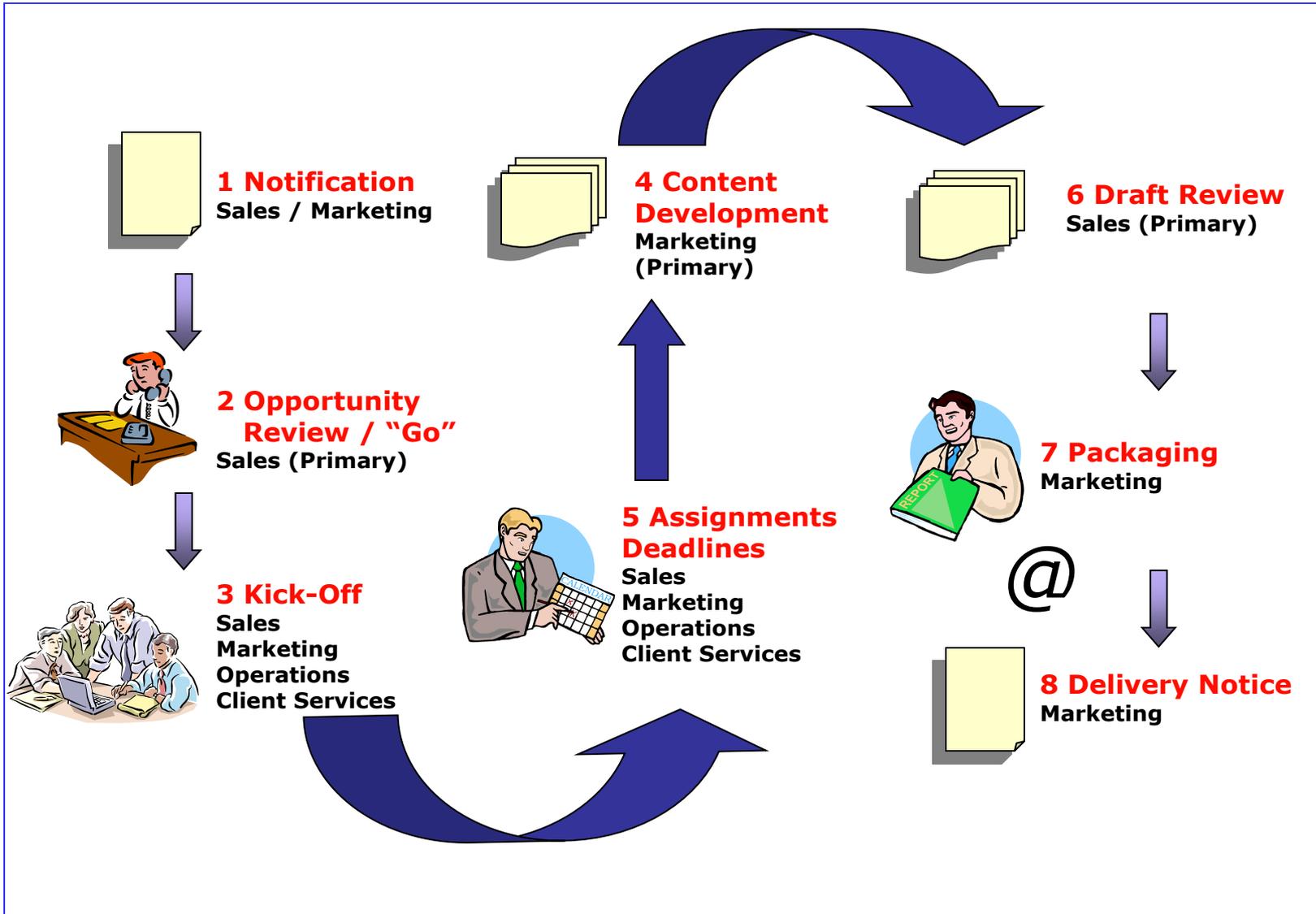
Swets Information Services

RFP Workflow

Purpose of a structured approach

- Ensure competitive position
 - Enhance content
 - Improve responsiveness
- Solidify internal procedures
 - Streamline the process
 - Improve communication

RFP Workflow Overview



Receipt of Notification

How solicitations are received

Activity	Responsibility
To PW via mail or RFP Outlook mailbox	SM or RSM
Directly from institution to PW	PW
To mailroom then, delivered to PW	PW
From e-alert (ie, Federal Business Opportunities and other registered sites)	SM, RSM, PW

SWETS

SM - Sales Manager

RSM - Regional Sales Manager

PW - Proposal Writer

Opportunity Review

SM determines solicitation opportunity

Activity

Responsibility

Inform PW if opportunity is go or no-go	SM, RSM
If go, then opportunity entered onto RFP Status schedule	PW
Customer Data Sheet (CDS) initiated	SM, RSM
If no-go, then no-bid letter sent	SM, RSM

SWETS

SM - Sales Manager
RSM - Regional Sales Manager
PW - Proposal Writer

Kick-Off Meeting

Sets the expectations with the team

Activity

Responsibility

Activity	Responsibility
Schedule kick-off meeting	SM, RSM
Determine agenda and attendees as capabilities/issues warrant for response (Client Services, Operations, Sales, EMS, Product Management)	SM, RSM
Update RFP Status schedule	PW

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Assignments/Deadlines

Assignments based on capabilities/issues

Activity

Responsibility

Content for critical issues	Sales/Operations
Non-standard responses	Sales/Operations
Legal input/review (Terms & Conditions, Confidentiality, Sample Agreements)	Contract Administrator and others as necessary
Technical expertise	Product Managers / EMS
CDS updated as necessary	RSM
Pricing, HCs initiated, reviewed, approved	SM, RSM, VP Customer Relations

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Content Development

Clearly convey Swets' advantages in view of customer's goals

Activity

Responsibility

Primary, standard response content	PW
Secure legal input, authorizations, signings	PW
Issues/non-standard	Sales/Operations Product Managers/EMS VP Customer Relations
Base development/assign for expertise	PW
Editing	PW

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Draft Review

Ensures accuracy and quality of response

Activity

Responsibility

Activity	Responsibility
Review	SM, RSM, Marketing Manager, VP Customer Relations, legal (if necessary)
Update RFP Status schedule	PW
Revise (repeat review iterations as necessary)	PW

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Final Packaging

Delivery of response

Activity

Responsibility

Secure all signatures, gather all response documents, send response	PW
Seek administrative support when necessary	PW
Update RFP Status schedule	PW

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Delivery Notice

Confirmation of receipt at customer's site

Activity

Responsibility

Notification of sent response to SM, RSM, Marketing Manager, VP Customer Relations	PW
Confirm receipt of response (via UPS tracking when applicable)	PW
Update RFP Status schedule to close project	PW

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