Management Consulting Services

Jan 2022

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Project Summary

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| Product/Service Requested: **Management Consulting Services**  ProcurementIQ RFP Number: **53923535** | |
| Product/Service Standard Coding | |
| Proposed RFP Deadline Dates | |
| Project Start Date | **[…]** |
| Deadline for Responses | **[…]** |
| Estimated Decision Date | **[…]** |
| Proposed End of Contract | **[…]** |
| Contact Information | |
| Name of Contact | **[…]** |
| Address | **[…]** |
| Telephone | **[…]** |
| Email | **[…]** |

Organizational Overview

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| **Organization Background** | [User-generated content] |
| **Objective** | [User-generated content] |
| **Current Solutions** | [User-generated content] |
| **Glossary** | RFP: The request for proposal issued to solicit bids for the product or service described herein.  Organization: The company issuing the RFP.  Vendor/Bidder: The company responding to the RFP.  Contract: The legal agreement between the organization and the vendor/bidder for the delivery of the products or services described in the RFP.  Governing Law: The contract shall be governed by the laws of the following jurisdiction: […].  Price: The amount that the organization will deliver to the vendor/bidder for the product or service described in the RFP. |

Statement Of Need

Specifications

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| **Scope of Work** | The organization seeks a qualified vendor to maximize its operational efficiency. Therefore, the selected vendor shall be responsible for providing the following services: […]. |
| **Experience** | To be considered, vendors should have a minimum of […] years of experience in the market. Additionally, the selected vendor should have extensive experience providing management consulting services to clients of similar size, industry and scope as the organization. |
| **Qualifications** | The organization expects vendors to have the following certifications and qualifications: […]. Additionally, any employees assigned to the project should have the following qualifications: […]. |
| **Contract Term** | The selected vendor shall provide all services described herein for […] years. The organization, in its sole discretion, will have the option to renew the contract for a period of […] years by agreement of both parties. |
| **Timeliness** | The organization expects vendors to complete the project in a timely manner, ideally by the following date: […]. However, the organization understands that unforeseen issues may arise throughout the provision of services, in which case the selected vendor must maintain a clear line of communication with the organization. |
| **Customer Service** | The selected vendor shall provide adequate support in the event of any service issues. At a minimum, the selected vendor shall provide an account manager that will serve as the buyer's main point of contact throughout the project. The account manager should be available during normal business hours at a minimum. |
| **Number of Employees** | Prospective vendors should be of a sufficient size to provide the management consulting services requested. Prospective vendors must have the staff capacity to provide the requested services within the time frame stated in the RFP. |
| **Location** | The selected vendor must be able to provide services at the following location(s): […]. Under certain circumstances, the organization may allow for remote work throughout the course of the contract. |
| **Financial Health** | To be considered, all prospective vendors should be financially sound. In particular, vendors should have a minimum credit rating of […]. |
| **Subcontractors** | The organization expects the vendor to employ skilled trade services from outside contractors as needed. However, all services conducted by subcontractors must be performed under the supervision of the vendor. It is understood that the vendor will be responsible for all payment of fees charged by the subcontractor(s). |

Proposal Format

Proposal Submission Requirements

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| **Proposal Submission Requirements** | Proposals must be submitted by the proposal deadline in the following format: […]. Each proposal should contain a cover letter, the vendor’s response to the organization’s statement of need and any additional documentation that is relevant to answering the RFP. Submissions not received by the deadline will not be considered. |
| **Technical Proposal** | Vendors should submit an in-depth technical proposal for the project. This proposal should specify how the vendor’s solution will meet the requirements of the RFP. |
| **Cost Proposal** | Vendors should submit a detailed cost proposal for the project. This proposal should cover the costs for all services described in the RFP. |
| **Methodology** | Vendors should describe their methodology for providing management consulting services, including how they conduct analyses and make recommendations. Moreover, vendors should describe any proprietary research or unique software solutions they use to facilitate their services. |
| **Experience & Qualifications** | Vendors should describe their experience in the market and any qualifications they have that relate to the project. The proposal should include information about the number of years the vendor has been in operation, their longest-tenured clients and how established they are in the market. |
| **Regulatory Compliance** | Vendors should document that they are currently in compliance with any local, state and federal regulations that are relevant to this market. They should provide evidence of appropriate certifications and licenses, if applicable, and indicate how they stay up to date on regulatory changes. |
| **Timeliness** | Vendors should include a description of the chronology for completing the work. This information should include a timeline and deadlines for each task described in the RFP. |
| **Competition** | Vendors should indicate how they maintain a competitive edge over other providers in the market. This information will be important for setting this proposal apart from the others that the organization receives. Vendors are also encouraged to document their reputation among peers and clients and to disclose information about client turnover rates. |
| **References** | Vendors should include at least three references from clients for whom similar management consulting services were rendered during the past two years. Please include the names, telephone numbers and e-mails for each contact. |
| **Service Offerings** | Vendors should submit a comprehensive list of all related consulting services they offer. Additionally, vendors should indicate whether they offer any bundling discounts based on contract size. |
| **Financial Health** | Vendors must disclose information about their financial health. This information should include copies of their most recent income statement, balance sheet and statement of cash flows. Additionally, vendors must indicate whether they have recently merged or been acquired by a competitor and if they have ever filed for bankruptcy. |
| **Location** | Vendors must indicate all states and cities where they operate and differentiate between their distribution networks and office locations, as necessary. Additionally, vendors should indicate whether their prices differ based on location. |
| **Conflicts of Interest** | Vendors should disclose whether they will face any potential conflicts of interest by entering into this contract. Failure to disclose conflicts of interest in advance could result in termination of the contract. |

Pricing Information

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| **Price per Unit** | Vendors should include a price estimate based on the information in the RFP. This information should include hourly rates for different tiers of consultants. Moreover, vendors should also include details on discounts for bundling services. |
| **Reimbursable Expenses** | Vendors should provide a detailed breakdown of all additional expenses that the organization will be responsible for reimbursing, including travel, lodging and other incidentals. Additional expenses that are not outlined will not be reimbursed. |

Vendor Questionnaire

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| **Consultant Experience** | •What professional experience do the consultants assigned to this project have? •Which companies have you worked with in the past? Can I contact them?  •Have you worked with a company of a similar size that had similar issues? What was the outcome? •What is your consultant turnover rate? |
| **Value-Added Services** | •Does your firm specialize in management consulting? •Do you provide any value-added services? If so, what other services do you offer? •How will including value-added services impact pricing? •What type of support services do you offer with management consulting? •How will travel restrictions related to the coronavirus impact your level of service?  •Amid widespread health concerns, what contingency plans are in place to mitigate the risk to your clients and employees? Do you offer clients any flexible exceptions, such as contract suspensions? |
| **Industry Experience** | •Does the industry in which my company operates impact the type of services I should expect? •Do you work with any clients in my industry? Can you provide references from these clients? •Do you have any potential conflicts of interest with my company? Do you service any of my direct competitors? •What is your renewal or repeat business rate for businesses in my industry, and how does that compare with your overall rates? |
| **Subcontractors** | •Does your consulting firm have the capacity to handle my company's requirements? •Will any subcontractors be hired to work on my project? •If subcontractors are used, what specializations do they have? •Why are subcontractors needed? For capacity or specialization purposes? •How do you ensure the quality of work performed by subcontractors? |
| **Proprietary Software & Technology** | •Do you use any proprietary software or technology? •What are the advantages of using your software as opposed to internal systems? •Does your software need to be licensed? •Is it required to use your proprietary software or technology, or can my company use its own systems? •If I decide to switch suppliers, is it possible to save the information contained in proprietary systems? |
| **Competition & Barriers to Entry** | •How do you win and retain business? •What is your reputation among your peers? •How long have you had your most-tenured client? •What do you consider to be best market practices in terms of switching providers? •What makes you stand out from the competition? •Are you experiencing fluctuations in demand as a result of the coronavirus outbreak? What measures are you taking to handle increased or reduced demand? |

Project Budget

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| --- | --- |
| **Contract Value** | [User-generated content] |
| **Payment Expectations** | [User-generated content] |

Selection Criteria

Decision Scorecard

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| **Technical Proposal** | Vendors will be selected based on how well their technical proposals fulfill the organization’s needs. Preference will be given to vendors with technical proposals that meet all requirements set forth in the RFP. |
| **Cost Proposal** | The organization will select vendors based on their ability to meet the requirements established in the RFP while keeping costs minimal. Therefore, vendors will be evaluated based on the competitiveness of their cost proposals. |
| **Experience & Qualifications** | Vendors’ experience in the market and their qualifications for meeting the organization’s needs will be key factors in the final decision on contract awards. In particular, the organization will consider how many years vendors have been active, how long their longest-tenured clients have been with them and how established their brands are. Additionally, the organization will take into account past projects vendors have completed. |
| **Timeliness** | Vendors will be evaluated based on the timeliness of their work plans. Preference will be given to vendors that have a record of completing services on schedule. |
| **Reputation** | Vendors should have a good reputation among clients and the larger market. In particular, the organization will look for vendors that are known for the quality of their services. The organization will give strong consideration to references from past clients. |
| **Strategic Partnerships** | The organization expects potential vendors to have strategic partnerships in place with other businesses. Vendors that demonstrate the value of these relationships will receive preference during the selection process. |
| **Financial Health** | Vendor financial health is a key consideration for this market. Because strong financial health is important for ensuring service continuity, preference will be given to vendors that do not have high financial risk or that have not faced recent bankruptcies. Private vendors should provide their most recent financial statements to disclose the health of their companies. |
| **Service Offerings** | The organization will evaluate prospective vendors based on the range of services they offer. Strong preference will be given to vendors that provide a wide range of services, in addition to the solutions being sourced in this RFP. |
| **Supplier Diversity** | The organization will give preference to traditionally underrepresented suppliers. In particular, the organization will look for the following types of diverse vendors: women-owned enterprises, minority-owned enterprises, veteran-owned enterprises and small businesses. |
| **Scalability** | The organization may expand its operations during the course of the contract. Therefore, preference will be given to vendors that have the capacity and capability to quickly scale their operations at minimal cost in response to structural changes within the organization. |