



Guidelines for Developing a SharePoint Request for Proposal

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Introduction.

Writing a Request for Proposal (RFP) for a planned Microsoft Office SharePoint Server 2007 project can be a tedious and daunting task. For organizations currently utilizing SharePoint, planning for future phases may be relatively straightforward. But, organizations unfamiliar with SharePoint's full capabilities may find it difficult to articulate, in advance, the benefits they expect to achieve by implementing it. To counter this uncertainty, it is important to look closely at your company's needs and use that information to guide your prospective implementation partners. This will enable respondents to offer details and reasoning for their recommended solution and, ultimately, provide you with a proposal that satisfies your needs.

This article offers some best practices for defining and documenting your SharePoint needs, and it describes how to seek out the information you may need to measure and select the partner best suited for your project.

Provide background and context.

The RFP should begin by providing background information about your company. At a minimum, this should include information about your industry, services, main competitors, relative size, geographic locations, and possibly department-specific information, if applicable to the content of the RFP. While this type of high-level contextual information may be readily available for public companies, it may not be for private companies; therefore, it is a good idea to include this at the beginning of the RFP so that all potential vendors are working from the same basis. This information will be helpful as a point of reference later in the RFP, when respondents are required to provide examples of their past experience.

You also should use the background section of the RFP to obtain information about each prospective partner. In this section, ask respondents to provide information similar to that you have shared about your own company, including size, location, financial information, awards and recognition, and a basic overview of their SharePoint's offerings and expertise.

Define your needs.

This section should explain your high-level objectives for a SharePoint solution. To develop this section of the RFP, it is important to take a step back and ensure that your team and company have a full—and shared—understanding of what you expect the project to accomplish. SharePoint has a vast array of features and can address a range of needs, from document management to portals and team sites to workflow automation. The more specific you can be with your objectives, the more specific and more accurate your respondents' proposals will be.

These are examples of appropriate high-level objectives:

- ◆ Establish a global home page with content targeted to specific users.
- ◆ Create an automated workflow process to store e-mails in SharePoint.
- ◆ Provide a structured taxonomy and metadata for ten departments.

Do you have a SharePoint implementation in your plans, but not sure where to start? If you are just beginning you should consider doing an assessment or strategic roadmap prior to issuing an implementation RFP. It's also a good idea to make sure you and your team has a good understanding of SharePoint's capabilities. Once you have

this knowledge you can design your application to balance the out of the box features versus the areas you will need to customize. Perhaps you are further in the process and have identified the functionality you would like to pilot. In this case, you may need guidance on developing detailed requirements.

In this section of the RFP, it also is important to communicate your organization's current SharePoint usage and experience. Some organizations currently do not use SharePoint at all, some use it minimally for selected tasks, and others may envision an extension of a fully functional intranet. Understanding its current usage and conveying that message within this section helps responding firms provide an accurate estimate of the project and system requirements.

Respondents also must understand the technical systems and hardware currently in place and whether those can handle any future SharePoint expansions; therefore, your RFP should detail:

- ◆ Current hardware or hardware platform
- ◆ Software (MOSS vs. WSS, Office 2007, SQL Server 2005/2008)

The better that responding firms understand your specific background and needs, the better they can design solutions that will meet your objectives. Furthermore, establishing a clear and consistent understanding of your needs and environment increases the chance that you will receive comparable proposals—enabling you to make an “apples-to-apples” comparison among potential vendors. Ultimately, this can make your decision process easier.

Articulate the type of solution(s) you are seeking.

Once you have identified the main focus of the project, it is important to specify key objectives and allow the respondent to provide a solution for each of the areas you have identified. For instance, if the project focuses on enterprise search capabilities, you will need to detail the issues your organization is currently experiencing and any requirements you have defined to solve those problems. It will be important to seek details about

the respondent's experience and ability to implement a third party solution, enhance the searching of a certain index, provide hit highlighting or recommended links, or develop other specific functionality. On the other hand, if your organization has not defined the type of solution it is seeking, use this area to express the current “pains” it is facing and any expectations for a solution that will alleviate the problem.

Following are descriptions of some potential solutions that you may want to address in your RFP.

Document Management

If document management is one of your areas of focus, SharePoint 2007 can provide a wide range of tools to address this need. Respondents may suggest one of several possible approaches to document management; therefore, you should provide some detail about how you intend to use SharePoint for this purpose. How do you manage current taxonomy? How do you categorize or tag existing content? Do you currently utilize any third-party tools for managing or searching for documents? Do you have any unconventional file types that you will need to store and access? How do you envision users navigating to or searching for documents? These are the types of questions that you will need to raise in order to receive comprehensive responsive to your RFP.

Workflow

SharePoint offers capabilities for automating and alleviating repetitive and manual processes through the use of workflows. As background for crafting your RFP, you should analyze and prioritize business processes to identify those that may benefit from implementing SharePoint workflows; for example, governance and reducing manual oversight. Are there any manual approval processes that SharePoint can help automate? Would some members of your organization benefit from receiving automatic alerts when different content is updated? Make sure your RFP provides details about which departments will utilize and benefit the most from these workflows.

Portal/Intranet

Are you considering a SharePoint solution as the central portal or intranet for your entire company? If so, this should be clearly noted within your RFP. Describe, at a high level, how your organization will utilize the portal. Which groups or departments will use it? How do you envision the portal increasing collaboration within your organization? This will allow your respondents to propose a creative solution for you.

Extranet

If you intend to use SharePoint as an extranet platform for communicating or collaborating with partners, clients, vendors, or suppliers, highlight this in the RFP. What is the purpose of implementing an extranet? With whom are you going to communicate and collaborate using this tool, and how will they be accessing it? What are the specific tools that each of the user groups of the extranet going to need for it to be a highly functional and beneficial application?

Collaboration

Collaboration is one of the biggest business buzz words today—one that has led to changes within all types of organizations, and rightly so. How is a lack of collaboration and information sharing inhibiting your organization? In what ways do your people need to communicate to increase efficiency and effectiveness? What are the barriers to effective collaboration? By digging into the issues that your organization experiences on a daily basis, you will be able to pinpoint a number of opportunities for a collaboration-based solution—a purpose for which SharePoint is well suited.

It is important to convey these and other essential needs without restricting prospective vendors from offering unique solutions. In certain cases, though, it also will be important to ask for specific information such as deployment suggestions, development approach, people and team capabilities, as well as benchmarking and project success metrics—but vendors should feel free to offer creative solutions to your organization's business pains. Download [West Monroe Partners' Sample SharePoint RFP Template](#) to view a sample layout and to see some suggested questions that you should ask respondents to address.

Define the methodology and approach

Finally, your RFP should enable you to understand respondents' proposed methodologies and approaches to your needs—whether those are focused on a single solution, such as document management, or a combination of solutions. This information can be categorized in three key areas: deployment, development, and people (role) considerations.

Deployment

Your respondents may take a number of possible approaches to SharePoint deployment. One major consideration is whether to utilize a “big bang” approach, implementing all of your desired components at once, or an iterative approach that adds one major piece of functionality at a time. Your choice of vendor may depend heavily on each respondent's project approach and methodology, so you should try to understand, at least at a high level, how your respondents plan to deploy the solution for your organization.

Secondly, ask respondents to provide an overview of their integration and configuration strategies. This can provide a picture of how they will direct the implementation and rollout phases.

Finally, the RFP response should help you understand their approaches and solutions for the “soft” side of the project. How will they approach end users and change management? How will they train users and drive adoption of the new SharePoint system? This will be critical to a successful project and should be a key consideration in your vendor evaluation; thus, your questions should elicit detailed responses.

Development

When it comes to development, there are some key pieces of information that can help you select the best partner for your solution. How does the respondent plan to develop your set of solutions? Will they use mostly out-of-the-box SharePoint web parts and templates, or will they architect a custom-developed tool? Depending on your needs, some may propose using a combination of these two approaches. Your RFP should include questions that will clarify their experiences with respect to building solutions using both of these approaches.

People and Roles

Finally, ask for information about the respondent's proposed team structure and the key roles it plans to fulfill in building your proposed solution. But, at the same time, be sure to explain your team's expected involvement throughout the project. Respondents should provide a high-level snapshot of their proposed teams and resources, including specific roles and number of team members, as well as a basic reasoning behind their proposed team structure. If your project will use a blended team of your own and your provider's resources, you will want respondents to provide examples of how they have used their proposed approaches successfully in the past. Gathering this information will provide you with a clear picture of exactly how each respondent's team will approach the project and whether it will fit your needs.

Final thoughts.

When drafting your RFP, it is important to adopt the perspective of your respondents. Put yourself "in their shoes" to determine whether you are providing enough information about your company and its needs. By balancing a detailed approach with some open-ended questions designed to elicit creative responses, you will enable respondents to provide competitive and accurate proposals—and improve the chances of creating a solution that meets your goals and expectations.

Remember that SharePoint is a platform, not a solution in itself. This means respondents may return unique and highly customized solution proposals. If you ground your RFP in your organization's needs, however, you should be able to make a sound "apples-to-apples" comparison. Very likely, your final decision will be clear.

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