

<ORGANISATION NAME AND LOGO>

REQUEST FOR INFORMATION

VERSION <INSERT VERSION NUMBER>
Sample

<INSERT DATE>

This template is summary in form and is not intended to constitute professional advice or a substitute for professional advice. Some conclusions and matters addressed in the template may be subject to opinion and judgement and do not necessarily contain all the facts and information necessary to reach an informed conclusion on the matter concerned. Consequently, this template should not be taken as complete, accurate, up-to-date, definitive for any similar situation, or fit for any particular purpose. This template should not be relied on in relation to any business or other decisions or otherwise and is not intended to replace the expertise and judgement of your independent accounting, tax, legal or other professional adviser.

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CONFIDENTIALITY

ALL INFORMATION CONTAINED WITHIN THIS DOCUMENT IS CONFIDENTIAL AND IS PROVIDED ONLY TO GIVE SUPPLIERS AN ADEQUATE UNDERSTANDING OF <FIRM C's> REQUIREMENTS. UNDER NO CIRCUMSTANCES SHOULD INFORMATION BE DISCLOSED TO ANY OUTSIDE PARTY.

Note: This template document is provided by way of example only and is not appropriate for use without revision. The main body of the text refers to the procurement of a software package. The document must be amended throughout to reflect the specific type(s) of software or service being requested.

Sample

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1 Introduction

This document is intended to provide sufficient information for suppliers to determine whether they are willing to participate in a more detailed selection process. It will enable the suppliers to provide sufficient information for Firm C to select a shortlist to which a Request for Proposal (RFP) will be issued. It is not intended that suppliers prepare detailed proposals at this stage. It is important that they provide basic information regarding capabilities and an indication, in broad terms, as to how they would approach working with Firm C to achieve the objectives set out in this document.

1.1 Overview of Firm C

This section provides a brief overview of the firm, which is likely to include the following information.

<Firm C's history>

<Firm C's strategic objectives>

< Firm C's organisation today>

1.2 Project Overview

This section provides a high level overview of the project for which the software being purchased is required, and the key milestones in the selection and implementation processes.

The <project name> Project is the establishment of <enter details of project>.

Specific objectives of the project are as follows:

- X
- Y
- Z.

The project involves the following key steps:

- Issuance of this document to a list of potential suppliers by <Day> <Month> 200X.
- Responses to be received by <Day> <Month> 200X.
- Based on responses to the RFI, a Request For Proposal (RFP) will be issued to a shortlist of suppliers (currently planned for <Day> <Month> 200X) with detailed requirements for the software, contractual details, and key success criteria for successful bidders.
- On the basis of the replies to the RFP document, a short list of potential suppliers will be selected and this group will be asked to present

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demonstrations of the product(s) which they propose using a series of business cases which will be circulated to the potential suppliers. These meetings will be completed by <Month> XXth, 200X.

- Construction of the infrastructure and processes for project <project name> by Firm C, and the implementation of the selected software. **Note:** you should specify whether the software will be implemented by Firm C, the selected supplier, or a 3rd party
- Establishment of the <project name> function. Firm C will complete this.
- Testing of Firm C processes and new software by <Day> <Month> 200X. Firm C will perform this.
- Implementation of the pilot of the new software and associated processes by <Day> <Month> 200X.

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2 Requirements

2.1 Business requirement to implement <project name>

<Insert the key business background to the project, such as to improve the sales process, or to introduce the Internet as a new market channel>

2.2 Overview of software requirements

Note: this section should provide a **high level** statement of the key requirements from the software to be provided. The description of requirements should enable suppliers to properly consider their interest in the project and provide the best response possible. It should be noted that this section should also include any **critical** non-functional requirements such as **regulatory requirements, security requirements, etc.**

The firms core requirements are for a new system that:

- X
- Y
- Z

2.3 Hardware and software requirements

<Insert technical considerations as appropriate, in particular specifying any constraints imposed by the current architecture.>

The following diagram sets out an overview of the technical environment in which the selected software will be implemented:

<Diagram of technical environment>

Integration considerations - software will have to interface with the following existing systems:

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3 Instructions to Suppliers

3.1 Response Requirements

We are looking forward to hearing about your capabilities, but would like to minimise the amount of preparation that you need to do at this stage. Our requirements are therefore intended not to require significant new material to be prepared.

Note: amend the following text as appropriate to reflect the type of product or service being requested

With this in mind, please could you provide the following information: -

1. By return of post, please send to <insert contact name> at Firm C <insert address> two copies of marketing brochures describing your organisation and setting out information about your product offerings in the areas of <enter details of type of software required and any other relevant requirements>. This documentation should be delivered no later than <Day> <Month> 200X.
2. Please answer the following questions to the best of your ability. Please reply in writing to <contact name> at <Firm C address> by <Day> <Month> 200X, enclosing two copies of the financial statements for the previous two trading years.
3. Contact <insert contact name> on <insert telephone number> or <contact name @Firm C email address> should you have any queries.

Question	Response
Company name	
Parent company	
Company address	
Name of person responsible for the information contained in this RFI	
Telephone number Facsimile number Email address Web page	
Initial year of operations	
Company location: Corporate office Local offices (UK) Local offices (US) Local offices (Europe) Other office	
Number of employees: UK Total Development	

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Question	Response
<p>Implementation</p> <p>Sales & administration</p> <p>Support</p> <p>Employee turnover rate</p> <p>Employee satisfaction (if surveyed and known)</p> <p>Key employees (names and terms of contract)</p>	
<p>Total revenue:</p> <p> Current year</p> <p> Previous year</p> <p>Total profit/loss</p> <p> Current year</p> <p> Previous year</p>	
<p>Please indicate any terms and conditions of trading together with an indication where it is agreeable to amend or alter those terms. If there are any terms, which you are not able or agreeable to alter, please specifically indicate those terms.</p>	
<p>Give details of your business continuity arrangements.</p>	
<p>Total number of installations of the version of the software being proposed.</p> <p>Have you supplied to customers in a similar industry, with a similar growth profile that would act as a reference site for you?</p>	
<p>If you are a VAR, total number of installations of the version of the software being proposed, which have been carried out by your organisation?</p>	
<p>Describe any third party alliances/relationships</p>	
<p>Please provide details of any outstanding legal action against your company or any directors or partners.</p>	
<p>Are there any anticipated mergers or acquisitions pending?</p>	
<p>Please provide information on your implementation methodology.</p>	<p>Attach as required.</p>

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Question	Response
What documentation is provided for the software / system?	
Was your software written by your organisation or acquired from a third party?	
<p>Training:</p> <p>Do you offer formal user training?</p> <p>What type of courses do you run and what is their duration?</p> <p>What level of training would you recommend?</p> <p>Describe any training materials offered?</p>	
<p>Please provide details of how the product is supported across multiple sites globally.</p> <p>What levels of support are available, definition of each level and what are the hours of operation and response times?</p> <p>Where are the support services located?</p> <p>Does support include product updates, as well as bug fixes at no extra charge?</p> <p>What is the helpdesk escalation procedure?</p>	<p>Sample</p>
<p>Please summarise the total costs of your product.</p> <p>What are the licensing costs for individual parts of the solution?</p> <p>Are new releases chargeable separately?</p> <p>What are your consultancy rates to help with implementation?</p> <p>What do you charge for customisation?</p> <p>What do you charge for training?</p> <p>What are the maintenance and support costs? Please give a breakdown.</p> <p>Do you offer discounts for volume purchases?</p> <p>Do you levy any charges for software or services during the evaluation period?</p>	

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