

Step 1

- Guide describing process and information to be gathered prior to the engagement.
- Receive a copy of the RFX and any associated documentation the member would send out to prospective vendors.
- Acknowledge receipt of documents. In your reply, include the legal disclaimer.

1 Overview

1.1 What is it?

- The RFP Review is a service provided by select analysts and advisors that consists of an off-line review of an RFI or RFP, henceforth referred to as an RFX, against the Info-Tech guidelines to provide feedback to the member on the alignment of the document with our best practices.
- The service consists of up to 3 hours of RFX review followed by a standard 45-minute call to communicate the results. The member also receives a written copy of the recommendations made.

1.2 Why would a member use this service?

- Any member putting out an RFX that wants to increase the quality of the responses.
- Who has never prepared an RFX and they are unsure of the proper format.
- Someone that has inherited a corporate RFX template and wants it validated.

1.3 Who is expected to perform this service?

- Any analyst or counselor that meets the following criteria:
 - Designated by their manager with
 - Relevant industry experience, as defined by their manager and VP, and has
 - Completed the RFP Review Service training

1.4 When is the right time to review an RFX?

- It should be relatively complete except for the requirements
- Watch for members trying to use the service to write the RFX for them