

# **Request for Proposal for a Service Provider**

# Table of Contents

- 1. STATEMENT OF WORK.....3**
  - 1.1 PURPOSE .....3
  - 1.2 COVERAGE & PARTICIPATION .....3
- 2. GENERAL INFORMATION.....4**
  - 2.1 ORIGINAL RFP DOCUMENT.....4
  - 2.2 THE ENTERPRISE.....4
  - 2.3 THE OPPORTUNITY .....4
  - 2.4 THE OBJECTIVES .....5
  - 2.6 SCHEDULE OF EVENTS.....5
  - 2.7 THE SUCCESSFUL PARTNER.....6
- 3. PROPOSAL PREPARATION INSTRUCTIONS .....8**
  - 3.1 SERVICE PROVIDER’S UNDERSTANDING OF THE RFP .....8
  - 3.2 GOOD FAITH STATEMENT.....8
  - 3.3 COMMUNICATION .....8
  - 3.4 PROPOSAL SUBMISSION.....9
  - 3.5 METHOD OF AWARD .....9
  - 3.6 SELECTION AND NOTIFICATION .....9
  - 3.7 INCURRED EXPENSES.....9
  - 3.8 CONFIDENTIALITY .....10
  - 3.9 STATEMENT OF WORK DEVELOPMENT AND SERVICE PROVIDER AWARD .....10
- 4. SCOPE OF WORK, SPECIFICATIONS & REQUIREMENTS .....11**
  - 4.1 SERVICE PROVIDER SERVICES .....12
- 5. SERVICE PROVIDER QUALIFICATIONS & REFERENCES .....14**
- 6. ESTIMATED PRICING.....15**
  - 6.2 PRICE SCHEDULES .....15
- 7. RFP RESPONSE SUBMISSIONS .....16**
- 8. SERVICE PROVIDER CERTIFICATION .....18**

# **1. Statement of Work**

## **1.1 Purpose**

The purpose of this Request for Proposal (RFP) is to invite prospective service providers to submit a proposal to conceive and propose a strategic solution and to supply the associated services and technology in the provision of a digital strategy and Web Content Management (WCM) solution to CLIENT (US). The RFP provides service providers with the relevant operational, performance, application, and architectural requirements of the system.

## **1.2 Coverage & Participation**

The intended coverage of this RFP, and any agreement resulting from this solicitation, shall be for the use of all departments at CLIENT (US) along with any satellite offices. CLIENT (US) reserves the right to add and/or delete elements, or to change any element of the coverage and participation at any time, including cancellation of the RFP process, without prior notification and without any liability or obligation of any kind or amount.

## **2. General Information**

### **2.1 Original RFP Document**

CLIENT (US) shall retain the RFP, and all related terms and conditions, exhibits, and other attachments, in original form in an archival copy. Any modification of these, in the service provider's submission, is grounds for immediate disqualification.

### **2.2 The Enterprise**

CLIENT (US) Corporation (CLIENT (US)), founded in 1970 in Utica, NY is a major medical products manufacturer specializing in surgical instruments and devices. Approximately 60% of the Company's revenues are derived from products designed for the orthopedic surgery markets of arthroscopy and powered surgical instruments. The Company also sells products for general and other surgical specialties such as electrosurgery systems for all types of surgery, and endosurgery instruments for minimally invasive laparoscopic surgery. Patient care products, including ECG electrodes for heart monitoring and pulse oximetry for blood oxygenation monitoring, are provided for various clinical settings.

Approximately 75% of the Company's revenue is derived from the sale of single-use products. Capital equipment such as powered drills and saws for surgery, electrosurgical generators, video-imaging cameras, fluid control systems, and surgical hand-pieces are marketed to facilitate the sale of disposable products. Additionally, CLIENT (US) provides integrated operating room integration for the most modern operating room facilities.

CLIENT (US) distributes its products globally through its own U.S. sales network, international direct marketing in nine countries, and specialty distributors in other countries under various brand names including CLIENT (US), Linvatec®, and Hall®. The company has built their global success on its commitment to offering superior medical devices to medical professionals around the world.

That commitment to superior medical care continues via CLIENT (US)'s focus on education and training. In 2012, the company opened an expansion on their Center for Orthopaedic Education. Located in Largo, Florida, this new 16,000 square-foot facility contains up to 21 training stations, a didactic auditorium and full multimedia capabilities. This world-class facility serves visitors from around the world and is focused on providing the latest information and education on arthroscopic products and techniques. Further, in late 2012 a similar facility was opened in New York City providing easy access for surgeons in the Northeast United States. Outside the U.S. CLIENT (US) has training facility in Germany to serve the European area and routinely holds training sessions in other facilities around the world.

CLIENT (US) is fueled and supported by an exceptional global team dedicated to providing premium products and service. Its mission is to build solid relationships both within and outside the company through integrity, trust and communication, with an emphasis on customer satisfaction and sustained growth of shareholder value. CLIENT (US) strives to demonstrate thoughtful leadership, provide meaningful opportunities for employees and be a responsible member of the local communities in which they conduct business.

### **2.3 The Opportunity**

CLIENT (US) is seeking to select a Service Provider and the appropriate technology to support its effort to revamp its digital presence online. CLIENT (US) is undertaking a strategic initiative to re-platform and redesign its web properties (sanctioned and unsanctioned websites, extranet, social channels,...) to better serve its customers and investors. In the simplest terms, CLIENT (US)'s requirements for an effective web presence have outgrown the capabilities of the current team and the current technology.

The organization is seeking a Service Provider to guide and lead them through the design and development of a new web presence (www.CLIENT (US).com, extranets, microsites, social channels),

along with the design and implementation of a new web content management system (WCMS) to power it. The new website and the supporting technology should be easy to use, enable stronger engagement with customers and prospects, deliver operational improvements, and provide a contemporary architecture that will allow CLIENT (US) to continue to grow and mature for years to come.

## 2.4 The Objectives

The primary objectives of this RFP process are to:

1. Provide a cohesive digital, mobile, and content strategy to support and develop CLIENT (US)'s digital maturity.
2. Improve CLIENT (US)'s digital presence and provide its global audiences with a consistent, well branded, elegant, and useful customer experience.
3. Update the company's digital visual presence to bring it in line with new graphic trends while remaining true to CLIENT (US)'s overall brand
4. Promote and support the commercial side of the business while maintaining a presence for additional audiences: i.e. investors (IR), prospective new hires (Careers) etc.
5. Leverage dynamic data in multiple formats from multiple sources to consistently deliver the most up to date content to CLIENT (US)'s global audience.
6. Increase lead generation opportunities through targeted campaigning to its various audiences (clinicians, administrators, investors, potential employees...), streamlining existing lead generation avenues, and introducing new opportunities as appropriate.
7. Increase customer satisfaction and referrals.
8. Incorporate new product data and assets to create a robust data experience for customers interested in all details pertaining to a particular product.
9. Allow data to be reused when possible to avoid content being out of sync.
10. Improve navigation to meet CLIENT (US)'s diverse audience needs.
11. Simplify globalization, localization, and personalization efforts in order to best serve to CLIENT (US)'s global audiences.
12. Update technology and associated/related processes to new standards and best practices.
13. Migrate the existing sales focused online resource website called "RepConnect" (built on Joomla, authentication for access required) and a "ShopPage" (hosted by www.Four51.com through a local Tampa based company called Independent Resources Inc) to the new technology platform.
14. Define baseline and ongoing key indicators and metrics for success.
15. Assist CLIENT (US) in transitioning to a more digitally oriented marketing company with a roadmap for the future.
16. Build a WCMS system that is scalable and expandable with the capacity to add additional functionalities over time.

The result being a global digital customer experience web system consisting of an integrated public and channel digital presence, equivalent mobile solution, and supporting electronic communications documents.

## 2.6 Schedule of Events

The following is a tentative schedule that will apply to this RFP, but may change in accordance with the organization's needs or unforeseen circumstances.

Issuance of RFP	October 21, 2013
RFP Questions/Inquiries Due	October 23, 2013 @ 5 pm ET

RFP Closes  
Complete Initial Evaluation  
Invitation to provide Proof of Concept  
Onsite POC

November 11, 2013 @ 10 am ET  
November 21, 2013 @ 5 pm ET  
November 21, 2013  
December 9 – 20, 2013

## 2.7 The Successful Partner

This section addresses fit. Please be sure your response addresses each of these items, demonstrating how you offer solutions that address these particular areas, and why your solution is appropriate for CLIENT (US)'s needs.

### Fit

Likely the single most important criteria in ensuring the success of any project with CLIENT (US) is the selected service provider's cultural "fit." CLIENT (US) has worked with a number of agencies through the years, and the projects that have gone most smoothly are those where the service provider has aligned its resources and throughput, and set a project pace that is a comfortable rate for both parties. In this project the expectation is that the successful partner will execute effectively on much of the work required to devise and deliver on the outlined objectives. Regardless of the resources executing, setting a realistic timeline will be important to help ensure that CLIENT (US) stakeholders can make informed decisions within appropriate timeframes aligned to their workloads. More important than any methodology on paper, the ideal service provider is empathetic to CLIENT (US)'s interests and circumstances: a very small team of hard-working professionals who have not engaged in the development of an enterprise digital marketing channel and who work in a diverse environment with complex priorities.

### Design

The service provider must demonstrate an ability to design and execute a visitor digital experience that serves and engages audiences similar to CLIENT (US)'s target audience segments. This includes using graphic design, interaction design, and information architecture to create positive outcomes where both the visitors and digital assets achieve their respective goals.

### Technology

The service provider must prove deep experience implementing and deploying sites on the technologies being considered (SDL Tridion or Sitecore), including adhering to general and platform-specific best practices. CLIENT (US) expects the delivered platform to be: stable and defect-free, appropriately scaled to expected content and traffic volumes, and architected to achieve optimal maintainability.

### Strategy

The service provider must be able to develop and provide a strategic vision for the website and overall digital presence (as well as make a compelling case to stakeholders) that goes beyond the basics to meet the unique global marketing needs of the company. CLIENT (US) is doing business in an environment that is changing dramatically, and that influenced by well-entrenched competitors. Therefore the company is looking for their entrance into the digital marketing environment to be a game-changing opportunity to establish a unique competitive edge.

### Project Management

The service provider must present a proven methodology for planning and executing projects of this type and scale. The methodology must minimally address:

- 1) How work is organized and distributed,
- 2) How progress is measured and communicated,
- 3) Governance and escalation, and

#### 4) Change control.

More than a methodology, however, the proposed Program/Project Manager must be adept at communicating appropriately at all levels within CLIENT (US) and his/her own resources to ensure that potential issues are resolved proactively, rather than reactively. If/when timelines slip, as they inevitably do, keeping CLIENT (US) informed and adjusting the plan accordingly is key to ensuring expectations are managed and conflicts are quickly resolved. Likewise, approaching the project in a consultative and educational manner, and guiding the project in a way that ensures it meets both the stated and *latent* needs of CLIENT (US) is critical to its success.

#### **Project Support**

The service provider must be prepared to provide ongoing product support in the development and project-build process to account for somewhat limited marketing and IT resources the company will be able to put toward the project. In addition, with the awareness that the company is venturing more fully into the digital sphere, effective training and development of individuals in the company during the process will be crucial to the success.

#### **Global Knowledge**

Because of the structure of the company's global presence, the service provider must be able to come up with a global management solution that makes it possible to engage with the individual country marketing units effectively both during the development and build out of the site and in the future.

#### **Location**

The service provider should be prepared to be onsite at CLIENT (US) offices regularly (although not daily) to work with CLIENT (US) project team members, report progress, review designs, etc. While a local office presence is not essential, CLIENT (US) does not expect to budget a lot for travel and expenses related to the service provider's fulfillment of this need.

### 3. Proposal Preparation Instructions

#### 3.1 Service provider's Understanding of the RFP

In responding to this RFP, the service provider fully accepts the responsibility to understand the RFP in its entirety, and in detail, including making any inquiries to CLIENT (US) as necessary to gain such understanding. CLIENT (US) reserves the right to disqualify any service provider who demonstrates less than such understanding. Further, CLIENT (US) reserves the right to determine, at its sole discretion, whether the service provider has demonstrated such understanding. That right extends to cancellation of award if an award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to CLIENT (US).

#### 3.2 Good Faith Statement

All information provided by CLIENT (US) in this RFP is offered in good faith. Individual items are subject to change at any time. CLIENT (US) makes no certification that any item is without error. CLIENT (US) is not responsible or liable for any use of the information or for any claims asserted therefrom.

#### 3.3 Communication

Verbal communication shall not be effective unless formally confirmed in writing by the specified procurement official in charge of managing this RFP process. In no case shall verbal communication govern over written communication.

Service providers' inquiries, questions, and requests for clarification related to this RFP are to be directed in writing to:

Cathy McKnight, Partner and Principal Analyst, Digital Clarity Group

Attention: Cathy McKnight  
E-mail: cmcknight@digitalclaritygroup.com

Applicable terms and conditions herein shall govern communications and inquiries between CLIENT (US) and service providers as they relate to this RFP.

Communications shall include, but are not limited to:

- Questions concerning this RFP: Questions must be submitted in writing and be received prior to October 23, 2013 @ 5 pm ET.
- Errors and omissions in this RFP and enhancements: Service providers shall bring to CLIENT (US) any discrepancies, errors, or omissions that may exist within this RFP. With respect to this RFP, service providers shall recommend to CLIENT (US) any enhancements that might be in the best interests of CLIENT (US). These recommendations must be submitted in writing and be received prior to October 23, 2013 @ 5 pm ET.
- Inquiries about technical interpretations must be submitted in writing and be received prior to October 23, 2013 @ 5 pm ET.
- Inquiries for clarifications/information that will not require addenda may be submitted verbally to the buyer named above at any time during this process.
- Verbal and/or written presentations and pre-award negotiations under this RFP.
- Addenda to this RFP.



**Addenda:** CLIENT (US) will make a good-faith effort to provide a written response to each question or request for clarification that requires addenda by October 28, 2013 @ 3 pm ET. All question/queries submitted will be answered and distributed to all participating service providers.

CLIENT (US) will not respond to any questions/requests for clarification that require addenda, if received by after October 23, 2013 @ 5 pm ET.

### 3.4 Proposal Submission

Proposals must be delivered on or prior to November 11, 2013 @ 10 am ET to:

1 copy to: Cathy McKnight  
Digital Clarity Group  
15 Hedgewood Dr.  
Unionville, ON L3R 6J2

3 copies to: Hani Tawil  
CLIENT (US) Corp.  
11355 Concept Boulevard  
Largo, FL 33773

CLIENT (US) shall not accept proposals received by fax.

Service providers are to submit one (1) original copy of proposal marked "Original" to each of the above addresses, as well as two (2) additional copies, marked "Copy" to the Largo, FL address. Each original and copy must be individually bound. An electronic version of the proposal must also be submitted to cmcknight@digitalclaritygroup.com by November 11, 2013 @ 10 am ET.

### 3.5 Method of Award

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, format, and enterprise. The purpose of this RFP is to identify those suppliers that have the interest, capability, and financial strength to supply CLIENT (US) with a Web Content Management/Digital Marketing solution identified in the Scope of Work.

#### Evaluation Criteria:

1. Capability of service provider to meet or exceed requirements set forth in Scope of Work.
2. Expressed interest in working with CLIENT (US) and the ability of service provider to communicate its vision and capacity for establishing a relationship that addresses current and future needs and trends in the industry.
3. Affordability of product(s) and support available from the service provider(s).
4. Financial stability of service provider(s).
5. Apparent likelihood and desirability of proposed software.
6. Implementation plan quality and risk.
7. Feedback from service providers' references.

### 3.6 Selection and Notification

Service providers determined by CLIENT (US) to possess the capacity to compete for this contract will be selected to move into the (paid) proof of concept (POC) phase of this process. Written notification will be sent to the selected service provider via email. Those service providers not selected for the negotiation phase will be notified via email once the POC service provider has been confirmed.

### 3.7 Incurred Expenses

This RFP does not commit CLIENT (US) to award a contract, nor will it be responsible for any cost or expense that may be incurred by the service provider in preparing and submitting the proposal in response

to this RFP, or any cost or expense incurred by the service provider before the execution of a contract agreement. The service provider shall be solely responsible for any and all costs associated with submitting a proposal including any and all costs associated with demonstrations, interviews, or presentations.

### **3.8 Confidentiality**

The service provider and its agents shall not disclose or communicate the aforesaid matters to a third party or use them in advertising, publications, propaganda, and/or in another job or jobs, unless written consent is obtained from CLIENT (US). CLIENT (US) recognizes that some of the material received from the service providers may be confidential and agrees not to disclose or communicate any material so marked outside of that disclosure or communication needed to fulfill the normal business of CLIENT (US).

### **3.9 Statement of Work Development and Service Provider Award**

Based on these results, a single service provider proposal will be selected as the finalist, under the condition that the parties are able to agree upon a contractual Statement of Work. The service provider finalist will be required to develop the Statement of Work. In addition, both a final software license and implementation services agreement will be finalized. If CLIENT (US) cannot reach agreement with the finalist, it may elevate the runner-up or any of the other proposals that have been submitted in response to this RFP.

## 4. Scope of Work, Specifications & Requirements

CLIENT (US) is seeking a partner team who can deliver on the following core elements:

1. Strategy: the development and execution of customer experience centered digital, mobile and content management strategies.
2. Technology: the selection and implementation of a web content management system (WCMS) that will provide the platform to deliver upon the above mentioned strategies.
3. Project management: project management, knowledge transfer, and education of CLIENT (US) resources throughout the project to ensure self-sufficiency post launch.
4. Staff augmentation: the provision of a team to be able to execute the majority of the tasks (technology, content, ...) associated with the successful execution of this project.

The result being a global digital customer experience web system consisting of an integrated public and channel digital presence, equivalent mobile solution, and supporting electronic communications documents.

The project's objectives cover all aspects of the implementation of a web content management system. It should also be noted that this implementation must occur with minimal business interruption at the time of the software launch. It is expected that the chosen service providers will do all that they can from a best practices standpoint, to ensure that while they will lead the complete initiative, they will also educate and guide CLIENT (US) throughout the process. CLIENT (US) is looking for a strategic partner willing to assume a leadership role by guiding, advising, and raising questions along the way to ensure decisions/requirements are understood (trade-offs assessed) and strategic goals and objectives are met rather than simply accepting change orders.

As CLIENT (US) continues to grow both domestically and internationally, the limitations of the current web-based systems is making it increasingly difficult to manage the digital information that needs to be presented to customers through a growing variety of devices and methods. The goal is to improve audience education, sales lead generation, and the customer experience while managing our expanding digital information in an efficient manner.

As a manufacturing company CLIENT (US) is most comfortable with business processes that can be mapped out, deadlines that can be toll-gated and defined, and scope documents that clearly outline all requirements as well as external facing impacts. The successful partner will:

- Bring great capabilities, best practices and talent.
- Lead the implementation and work across all functions.
- Bring insight and strong positive drive for CLIENT (US) success.
- Drive results including an SEO strategy and other "go to launch" phase 1 tactics versus post launch phases.

As in projects like this, there will be decision-tree situations in which priorities and moving forward decisions will need to be evaluated in terms of benefits and associated costs. It will be important to CLIENT (US) that the service provider they chose function like a true partner in these high-risk moments, effectively guiding CLIENT (US) to the best decision in terms of ease of execution versus associated costs, rather than simply adding additional deliverables or expenses to the project. Please be sure to outline your approach within your response to these complex situations, in which there is no right or wrong answer, but where the choice a company makes can, at least in part, can impact the difference between failure and success.

Responses should also clearly define the proposed phases of implementation detailing associated pricing, rationale, cost-benefit analysis and risks/rewards, etc. There should also be a clear proposed delineation of scope for each phase (if phasing is proposed), clear strategic recommendations for how to advance the project, and proposals for functionality to go to market. As an example: Phase one to include basic personalization, Phase two full personalization and campaigns, Phase three transactional ecommerce, etc.

*Note: Responses to this RFP document should explicitly address each of the above elements. It is assumed that the proposed approach/phasing/... is applicable for either of the technologies being considered (SDL or Sitecore). And expected variances based on the technology selected should be clearly noted.*

## **4.1 Service Provider Services**

### **4.1.1 Program and project management**

Provide leadership, mentorship, and project management for all (strategic, technical, creative) streams of work required for the successful development and execution of CLIENT (US)'s digital strategy. CLIENT (US) has assigned an FTE Web Project Manager for this initiative to assist with the coordination of required CLIENT (US) resources, and execution of CLIENT (US) assigned tasks.

### **4.1.2 Strategy**

Develop a clearly articulated phased roadmap to execute the delivery of digital, mobile, content management (including content and asset migration), and launch strategies and requirements for those strategies.

### **4.1.3 Project execution**

Leadership for and the delivery of all aspects of the launch phases of the digital, mobile, and content management strategies, as well as the implementation of the new web content management system as detailed in sections 4.2 through 4.6 to meet, at minimum, the stated objectives outlined in section 2.4 of this RFP document. This includes marketing support for the launch of the new site.

Direction from the service provider in defining and establishing a baseline for key indicators and metrics for success can be measured at and after launch to guarantee that goals and objectives of this new marketing program are met will be critical. These criteria will help ensure that identified success factors are achieved. CLIENT (US) is looking to the successful service providers to share in the accountability, responsibility, and risk for this initiative's success.

### **4.1.4 Knowledge transfer**

Educate and train CLIENT (US) team members throughout the project on the strategies, best practices, and execution of the deliverables associated with this RFP. Assure that training and testing protocols are well documented and available to CLIENT (US) upon completion of the project, thus ensuring that the training is effective, retained and referenceable.

As a manufacturing company CLIENT (US)'s product launch methodology includes the use of Quality Function Deployment (QFD). It will be important that proven tools such as a QFD to gather and prioritize project requirements are utilized.

#### **4.1.4 Resource augmentation**

Provide the necessary personnel, either from internal or third party resources, to execute on the delivery of the initial phases of the digital, mobile, and content strategies, as well as the implementation of the WCMS.

These resources could include, and may not be limited to:

- Technical resources: developers, system integrators, system architects.
- Creative resources: visual/graphic designers, content creators, information architects.
- Project management resources: Program manager, project manager, team leads.

## 5. Service provider Qualifications & References

All service providers must provide the following information in order for their proposal to be considered:

1. A brief outline of the service provider company and services offered, including:
  - Full legal name of the company.
  - Year business was established.
  - Number of people currently employed.
  - Income statement and balance sheet for each of the two most recently completed fiscal years certified by a public accountant.
2. An outline of the product line-up it currently supports.
3. A description of its geographic reach and market penetration.
4. An outline of its partnership and relationship with the considered WCMS vendors – SDL Tridion and Sitecore.
5. An outline of its related experience with both SDL Tridion and Sitecore.
6. Information on current SDL Tridion and Sitecore software clients, including for each platform:
  - Total number of current clients.
  - A list of clients with similar needs using the software.
  - Evidence of successful completion of a project of similar size and complexity.
7. References: Contact information for a reference from projects similar in size, application, and scope, and a brief description of their implementation for each SDL Tridion and Sitecore.

## 6. Estimated Pricing

All service providers must fill out the following cost breakdown for the implementation of their Web Content Management solution for CLIENT (US)'s project as described in this RFP. Costs should be identified as either capital or non-capital in nature. The service provider must agree to keep these prices valid for 60 calendar days as of November 11, 2013.

### 6.2 Price Schedules

For all deployment models checked above, provide a comprehensive pricing sheets for each SDL Tridion and Sitecore, which include licensing, maintenance, and support. Please ensure pricing is detailed in the same manner for both platform solutions.

Cost Analysis: The following criteria will be used to assess proposal costs:

1. Professional Services (broken out by phase)
2. Overall Product Cost
3. Data Conversion/Migration
4. Implementation Services
5. Non-Labor Expenses
6. Training
7. Other

CLIENT (US) reserves the right to contact vendors concerning cost and scope clarification at any time throughout the selection and negotiation processes.

# 7. RFP Response Submissions

Proposals should be organized as follows:

- | Section | Title   |
|---------|---|
| 1.0     | <b>Executive Summary</b><br><p>This part of the response to the RFP shall be limited to a brief narrative highlighting the vendor’s proposal. Please note that the executive summary shall identify the primary contact and their associated with e-mail address.</p>   |
| 2.0     | <b>Overview of Services/Capabilities</b><br><p>This section should be dedicated to the vendor’s overall services and capabilities, not just those being utilized for this project. Although it should be brief in nature and should touch on the breadth and depth of the related offerings available.</p>  |
| 3.0     | <b>Project Scope and Assumptions</b><br><p>This section of the proposal should include a general discussion of the vendor’s understanding of the “overall” project, the timetable, the scope of work proposed, and a summary of the proposal’s major assumptions. CLIENT (US) is seeking responses that will clearly outline the advantages and disadvantages of the project scope. To assist CLIENT (US) in shaping the project scope (refer to sub-sections 2.3, 2.4, and all of section 4, of which all points should be responded to within the proposed solution text), the vendor shall provide a response that will:</p> <ul style="list-style-type: none"><li>• Outline a strategy for implementation, including timeline and order of implementation.</li><li>• Communicate the advantages and disadvantages of the project scope, including, but not limited to, pricing and launch strategy.</li><li>• Explain the risks associated with the project scope and detail their abilities to mitigate or minimize this risk.</li></ul> |
| 4.0     | <b>Implementation Plan / Proposed Approach</b><br><p>The prospective vendors must provide a detailed plan for implementing the proposed approach. This information MUST include:</p> <ol style="list-style-type: none"><li>a) Detailed description of proposed approach, including rationale.</li><li>b) Project organization chart</li><li>c) Overview of project management methodology</li><li>d) Summary workplan. The plan must include an estimated time frame for implementation. The detail MUST also include an estimate of work effort for CLIENT (US) and service provider in percentages (e.g., 50% CLIENT (US) effort; 50% vendor effort). Both CLIENT (US) and the service provider work effort estimates will be outlined in the Statement of Work and attached as part of the services contract.</li><li>e) Any software or hardware requirements including and in addition to those outlined in the RFP</li></ol>  |



Responses must include work effort and costs for the recommended timetable. Service providers shall provide a work effort estimate that CLIENT (US) will use as a guide to allocate their own staff to the project. Service providers shall also detail the advantages and disadvantages including cost assumptions and risk factors for the recommended timetable.

5.0 Service provider Qualifications & References

Each vendor shall provide the information requested in section 5 of this RFP document so that CLIENT (US) can evaluate the vendor's stability and ability to support the commitments set forth in response to the RFP.

7.0 Cost Proposal

Respondents shall submit calculations for project costs and pricing model and/or approach as detailed in section 6 of this RFP document. CLIENT (US) reserves the right to purchase any combination of services at the pricing presented in any response to this RFP.

8.0 Documentation

Any technical, design, roadmap, or other specifications/maps/... to support the proposed solution, as well as a signed copy of Section 8 – Service Provider certification.

## 8. Service provider Certification

This certification attests to the service provider's awareness and agreement to the content of this RFP and all accompanying calendar schedules and provisions contained herein.

The service provider must ensure that the following certificate is duly completed and correctly executed by an authorized officer of its company.

This proposal is submitted in response to Request for Proposal for Service Provider services and Web Content Management Solution(s) issued by CLIENT (US). The undersigned is a duly authorized officer, hereby certifies that:

\_\_\_\_\_  
(Service provider Name)

agrees to be bound by the content of this proposal and agrees to comply with the terms, conditions, and provisions of the referenced RFP and any addenda thereto in the event of an award. Exceptions are to be noted as stated in the RFP. The proposal shall remain in effect for a period of 60 calendar days as of the Due Date of the RFP.

The undersigned further certify that their firm (check one):

- IS  
 IS NOT

currently debarred, suspended, or proposed for debarment by any federal entity. The undersigned agree to notify CLIENT (US) of any change in this status, should one occur, until such time as an award has been made under this procurement action.

Person(s) authorized to negotiate on behalf of this firm for the purposes of this RFP are:

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Signature of Authorized Officer:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_