Consulting

RFP

TEMPLATE

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1 Purpose

[Company] seeks to launch an initiative called [Name of the Project] in order to [brief description of the main objective of the project]. The objective of this RFP is to explore how consultants could support [Company] in this endeavor and to select one partner to accompany them on the project.

2 Background

2.1 About

[Company Name], founded in [Year], is a leading [Industry or Sector] company committed to [Mission or Core Values].

[If relevant to this project, you can add a brief overview of your company's foundation, highlighting any historical milestones, core principles, or unique insights that have shaped your business and are pertinent to this project].

Specializing in [Main Business Lines], we have cemented our position in [Markets or Geographical Areas], delivering [Brief Description of What They Deliver] to meet the dynamic needs of our clientele.

With operations across [Number of Countries or Regions], [Company Name] has a footprint in [Key Markets or Regions], powered by a team of over [Number of Employees] employees.

[If the structure of your internal organization plays a significant role in the [Name of the Project] initiative, please include a brief description that outlines the organization's design.

For example: 'Our company has implemented a [centralized/decentralized] organizational structure, segmented into [number] primary business units—[List Business Units, e.g., X, Y, Z, & A]. Each unit focuses on distinct market segments.]

[If relevant to the project, please provide a brief description of the relevant product lines / services lines / technologies.

For example, a leading global technology company might state: 'Our portfolio encompasses three main product lines designed to cater to a diverse range of consumer and professional needs: 1) Personal Computing Devices, including smart tablets and laptops 2) Mobile Communication Solutions, mainly smartphones. 3) Wearable Technology, smartwatches and accessories.]

The past fiscal year marked a significant milestone for [Company Name], achieving [Key Figures and Achievements.

For Example, 'The past fiscal year marked a significant milestone for CompTech, achieving notable growth in a highly competitive market. Our sales reached $4.5 billion, representing a 15% increase from the previous year, while our EBITDA improved significantly to $1 billion, reflecting not just revenue growth but also improved operational efficiency and cost management. This growth is underpinned by the successful launch of our new line of high-performance laptops, which accounted for a 25% increase in our personal computing devices segment. Additionally, our investment in R&D paid off with the introduction of our proprietary AI-driven operating system, leading to a 40% growth in software and services.'].

2.2 Additional Information

The [Name of the Project] initiative will be spearheaded by our [Name of the Team, e.g., Strategy Team].

[Add all relevant information about the team.]

For example, This team is tasked with ensuring synergies between business units and focusing on future innovations and projects to prepare for upcoming market challenges and opportunities. Based primarily in Amsterdam, the Strategy Group consists of 10 professionals with diverse backgrounds in strategic planning, market analysis, and innovation management.

They work in close collaboration with decentralized strategy teams across each business unit, fostering a cohesive approach to global expansion while accommodating the unique demands and opportunities of different markets.

In addition to their work with business units, the Strategy Group maintains strong functional ties with the R&D group, the Marketing Group, and Finance.

2.3 Strategic Background

The [Industry Sector, e.g., technology, healthcare, energy] industry is currently experiencing [Describe Key Industry Trends, e.g., rapid technological advancements, regulatory changes, shifting consumer preferences that are relevant to to project.]

Historically, [Company Name] has been a pioneer in [Briefly Describe Past Strategic Initiatives, e.g., adopting green technologies, entering emerging markets, leveraging digital transformation], setting a strong foundation for sustained growth and market presence. Our current strategic initiatives are focused on [Current Strategic Focus, e.g., expanding our product line, enhancing service delivery, improving operational efficiency].

The upcoming [Name of the Project] initiative is a natural extension of our ongoing efforts, aimed at [Describe How the Project Fits into Current Strategy, e.g., exploring new market opportunities, addressing a critical industry gap, enhancing customer experience].

3 Context

3.1 Rationale for the project

[Please articulate the driving forces behind the initiation of your project. Consider including an analysis of the relevant market context, key insights from your company's recent results, and how this initiative aligns with or diverges from ongoing strategic objectives. The rationale should clearly outline why now is the opportune moment for this project, what specific needs or opportunities it addresses, and how it fits within the broader strategic framework of your organization.]

For example, The Eastern European market presents a significant growth opportunity for wearable technology, characterized by increasing consumer interest in health and wellness, rising disposable incomes, and a growing appetite for the latest technological innovations.

Recent performance metrics of CompTech underscore our strength in the wearable accessories sector, with a [X%] year-over-year growth in sales globally, demonstrating robust demand and *customer satisfaction. These results not only validate our product's market fit but also highlight the potential for replicating this success in new markets.*

Strategically, CompTech has prioritized geographic expansion as a key pillar of its growth strategy, aiming to diversify market presence and reduce dependency on saturated markets. The Eastern European market, with its untapped potential and favorable demographic trends, aligns perfectly with this vision. Our preliminary market research indicates a significant untapped customer base eager for innovative wearable technology that integrates seamlessly with their digital lifestyle, offering both functionality and fashion.

Moreover, this initiative is part of a broader group strategy to establish CompTech as a leading global provider of wearable technology. Entering the Eastern European market is a critical step towards achieving this goal, allowing us to leverage our technological advancements, enhance brand recognition, and build a strong foundation for further expansion into adjacent regions.

3.2 High level objectives

With the launch of this project, [Company] intends to [describe the high-level objectives of your project or questions you want to answer with the support of the consultants. This section should outline the strategic aims and critical inquiries driving the project, providing a clear direction for the consulting engagement.

For instance, with the launch of the "Eastern Market Entry" initiative, CompTech aims to explore the feasibility of establishing a presence in the Eastern European market. The high-level objectives include:

- *Market Validation: Confirm the existence of the opportunity and quantify the market size.*
- *Competitive Strategy: Understand the competitive landscape to identify what it takes to succeed.*
- *Feasibility and Impact Analysis: Assess the viability of market entry by developing a comprehensive business case.*

3.3 Expected benefits

[Please outline the anticipated benefits that [Company] expects to realize as a result of successfully completing this project. These benefits should be articulated in both qualitative and quantitative terms, reflecting the direct impact on the company's operations, financial performance, and strategic positioning. Consider including specific metrics, such as percentage increases in revenue, cost savings, efficiency improvements, or enhancements in customer satisfaction, to provide a clear picture of the project's potential value.

Additionally, consider discussing the expected impact on stakeholders, including employees, customers, and partners, to provide a comprehensive view of the project's potential contributions to the company's success.]

For example, if the project involves a market entry strategy, [Company] might expect:

- *An additional [X%] increase in top-line revenue within the first three years of market entry.*
- *Improved market share in the new region, targeting a [Y%] share within a specified timeframe.*

- *Enhanced brand recognition and customer base expansion in the Eastern European market.*

Conversely, if the project focuses on operational excellence, the anticipated benefits could include:

- *A reduction in operational costs by [Z%] through streamlined processes and improved efficiency.*
- *Productivity improvements of [A%], resulting in faster turnaround times and increased output.*
- *Enhanced flexibility and scalability of operations to quickly adapt to market changes and customer demands.*

3.4 What has been done

[If relevant, provide a detailed account of the progress made on the initiative to date. This includes an overview of the steps already taken, the resources and analyses available for the consultant's use, and a candid evaluation of the viability and quality of these existing inputs. It is also important to delineate which aspects of the project are open for reassessment and which elements are considered final and not subject to change.]

For instance, CompTech has already:

- *Conducted preliminary market research to identify potential demand in the target market, resulting in a comprehensive report that highlights key consumer trends and preferences.*
- *Developed an initial business case, including revenue forecasts and cost estimates, to evaluate the financial viability of entering the Eastern European market.*
- *Engaged with potential local partners and distributors to understand the logistical and operational challenges of market entry.*

CompTech considers the preliminary market research and initial stakeholder engagements as critical inputs that should remain unchanged. However, all financial models, operational strategies, and risk assessments are open for comprehensive review and enhancement to ensure the project's success.

4 Scope & Deliverables

4.1 Scope

[Please describe the extent of the project, including geographical boundaries, operational or market segments to be explored, and the specific teams or departments involved. This will ensure that consultants have a clear understanding of the project's scale, the areas of focus, and the expected workload.]

For a market entry analysis project, for example, the scope may include:

- *Define the specific countries or regions within Eastern Europe where the market entry is being considered. This might include prioritizing markets based on preliminary research or strategic fit.*

- *Detail the specific customer segments or industry verticals to be analyzed, potentially focusing on those most likely to adopt wearable technology.*
- *Outline the extent of competitive analysis required, specifying whether it should include local, regional, or international competitors.*

For an operational excellence project, the scope could encompass:

- *Specify the manufacturing sites, supply chain logistics, or service delivery processes to be assessed, possibly focusing on high-cost or high-volume operations.*
- *Identify the key performance indicators (KPIs) to be improved, such as cost reduction targets, efficiency gains, or quality enhancements.*

For a team effectiveness project, the scope might detail:

- *Name the specific teams or departments to be evaluated, including the size and structure of each team.*
- *Define the metrics or outcomes to assess team effectiveness, such as collaboration efficiency, project delivery times, or innovation rates.*

4.2 Expected Deliverables

Below are the key deliverables, organized by the project's main activities, along with the most critical milestones and deadlines. It is important to note that these phases and deadlines highlight only the most crucial points in the project timeline. [Company] is open to suggestions on reorganizing deliverables, phasing, or introducing new deliverables should the consultant find it beneficial for achieving the project's goals.

Outline your deliverables here.

For example:

1. Market Analysis and Feasibility Study

- ***Deliverable A:*** *Comprehensive market analysis report, including market size, growth trends, consumer behavior, and regulatory environment for the targeted Eastern European markets.*
  - *Milestone: Completion of preliminary market analysis by [Specific Date].*
- ***Deliverable B:*** *Feasibility study report, assessing the viability of market entry, including a competitive landscape analysis and potential market entry barriers.*
  - *Deadline: Submission of the feasibility study report by [Specific Date].*

2. Business Case Development

- ***Deliverable C:*** *Detailed business case, including financial projections (revenue, costs, ROI) and strategic implications of the market entry. The business case should also highlight potential risks and mitigation strategies.*
  - ***Milestone:*** *Initial draft of the business case to be reviewed by [Specific Date].*
  - ***Final Delivery:*** *Final business case to be presented to the executive board by [Specific Date].*

3. Operational Strategy and Implementation Plan

Deliverable D: *Operational roadmap, outlining the steps required to establish presence in the market, including logistics, supply chain, partnerships, and operational setup.*

Implementation plan, detailing timelines, key actions, responsible parties, and resource allocation for the market entry strategy.

4.3 Support Required

[Please define the scope and nature of the support required from the consulting firm. Consulting support can vary widely depending on the project's objectives, the client's internal capabilities, and the desired outcomes. It may range from high-level strategic advice where the consultant's role is primarily advisory, to a more hands-on approach where consultants are expected to take charge of executing specific project components. Clearly articulating the type of support needed will help ensure that the consulting firm can align its proposal with your expectations and project needs.

Example:

The internal team responsible for this initiative is newly formed and lacks extensive experience in international market entries.

Support Required:

- *Consultants will provide expert insights and knowledge on the Eastern European market, focusing on consumer behavior, regulatory considerations, and competitive landscape. Their role will be to guide [Company]'s strategy based on proven methodologies and industry best practices.*
- *Given the team's nascent stage, [Company] seeks a consultant who can facilitate knowledge transfer and provide training sessions. These sessions should equip the team with the necessary skills and understanding to navigate the complexities of market entry strategies effectively.*
- *While the immediate scope does not include implementation support post-recommendation, [Company] is open to exploring this as a subsequent phase. However, as the decision to proceed with implementation support is not finalized, it falls outside the current project scope.*
- *Although implementation support is not currently in scope, [Company] requests a non-binding estimation of costs for such services. This will help in future planning and decision-making regarding the extent of the consulting engagement beyond the initial advisory phase.*]

5 Schedule and Budget

5.1 Start Date

The project is anticipated to commence on [specific day, week, period of the month, quarter, or use relative dates such as before/after a certain event or date].

5.2 End Date

The project is anticipated to end on [specific day, week, period of the month, quarter, or use relative dates such as before/after a certain event or date].

5.3 Expected Duration

The anticipated duration of the project is [number of days, weeks, months, or a specified range].

5.4 Target Budget

The anticipated budget for this project is [specified amount, range, or 'less than' a certain figure]

6 Other Requirements

6.1 Language

The working language of the project will be [primary working language], however, the consultants are expected to communicate with local teams in [local language(s)].

6.2 Team Set-up

[Detail any specific requirements regarding the consulting team's composition for different phases of the project. This could include preferences for expertise levels, seniority, or the minimum or maximum size of the consulting team.

Example

A Project Manager must lead the consulting team throughout the entire project duration to ensure consistency, effective communication, and adherence to timelines.

All consultants at or above the Senior Consultant level should possess significant experience and expertise in their respective fields. [Company] emphasizes the importance of knowledge transfer to our internal teams, necessitating that consultants are not only experts in their domain but also skilled in conveying their knowledge effectively.

Given the project's focus, at least one member of the consulting team must have deep expertise in wearable technologies, including market trends, consumer preferences, and technological advancements.

Expertise in the Eastern European high-tech market is crucial. The team should include a consultant with specific insights into this geographic area, including cultural nuances, regulatory environment, and market entry strategies.]

6.3 Location

The primary location of the project will be [Primary Location], but the consultants are expected to be present at [Other Locations] as necessary. [Company] acknowledges the efficiency and flexibility of remote working arrangements and encourages consultants to favor remote working whenever possible, in alignment with project requirements and deliverable schedules.

6.4 Additional Requirements

Add here any other requirements you might have. For instance:

- **Knowledge Transfer**: Consultants should plan structured handovers, workshops, or training sessions to enable internal capability building.

- **Confidentiality**: Consultants must adhere to [Company]'s confidentiality guidelines and the terms of the pre-signed NDA.
- **Conflict of Interest**: Firms must disclose any existing relationships or situations that could present a conflict of interest.
- **Communication**: Weekly updates and milestone reviews are expected, along with a monthly steering committee meeting.
- **Tool Compatibility**: Proposed tools must be compatible with [Company] systems (e.g., Microsoft 365, SAP).
- **Availability**: Teams should remain accessible during [Company]'s working hours ([time zone]) and respond quickly in critical situations.
- **Sustainability Alignment**: When relevant, consultants should reflect [Company]'s ESG and sustainability values in their approach.

7 Proposal Content

7.1 Expected Proposal Content

[Company] expects each submission to include the following components:

- Approach (Including work streams, deliverables and timelines)
- Set-up/team structure/Governance
- Expected workload for [company]
- Expected Team (including CVs and relevant experience)
- Credentials and reference cases
- Fees

7.2 References & Expertise

Beyond the case references provided to demonstrate the consulting firm's credentials and expertise, [Company] expects to receive X personal references. These references should be directly relevant to the scope and objectives of our project and should ideally reflect similar challenges or industries. For each reference, please include the following information:

- **Contact Information:** Provide full contact details, including the name, position, email, and phone number of the reference contact.
- **Title and Company Name:** Specify the title of the reference contact and the name of the company where the referenced project was executed.
- **Project Overview:** A brief description of the project, including its objectives, scope, and outcomes. Highlight how the project is relevant to the objectives of the current initiative.
- **Relevance to the Current Project:** Explicitly state how the experience gained and the results achieved in the referenced project relate to and can inform the success of the proposed project.

It is imperative that the consulting firms inform these references beforehand that [Company] may contact them as part of the evaluation process. This ensures that the references are prepared and willing to provide candid feedback on their experience working with the consulting firm.

7.3 Fees & Workload

[Company] mandates a detailed breakdown of fees and workload for every phase of the project, specifying the roles and expertise levels of the consulting team members involved.

All proposals must rigorously comply with the pricing terms and conditions previously established in any existing Master Service Agreements (MSAs) with [Company].

Furthermore, [Company] insists that consulting firms transparently detail any financial incentives, such as discounts and rebates, available under the proposal. Additionally, proposals should clearly articulate the structure of performance-based compensation, delineating between fixed and variable fees, and explaining the criteria and mechanisms for performance evaluation and reward.

8 RFP Process

8.1 Milestones

- RFP: [Date]
- Briefing: [Date]
- Q&A: [Date]
- Proposals: [Date]
- Pitch and selection: [Date]
- Project Start: [Date]

8.2 Eligibility and qualifications

If needed, specific criteria or qualifications required for the project

8.3 Selection Criteria

- Expertise in [Expertise needed – Capabilities]
- Experience in [industry Experience]
- Relevant references in [Region / Industry Experience / Expertise]
- Experience of the team (resumes to be included in the proposal)
- Quality and clarity of illustrative deliverables
- Quality of approach (process, planning, governance)
- Quality of methodologies
- Fit with the teams
- Budget

8.4 Q&A

[Company] is committed to providing clear and comprehensive responses to any questions consulting firms may have regarding this RFP. To facilitate this, we have outlined the following Q&A process:

- All questions must be submitted in writing via email to our project lead, Alex Johnson, at alex.johnson@company.com.
- The deadline for submitting questions is [specific date].

- [Company] will consolidate all received questions and prepare a comprehensive Q&A document to be distributed to all firms.
- Should any question reveal proprietary or sensitive information, [Company] will anonymize the question to protect the confidentiality of the inquiring firm.
- [Company] reserves the right to keep some questions and answers private, communicating directly with the consulting firm that inquired if the information is deemed too sensitive or proprietary for broader distribution.

8.5 Other Elements

Add here any other procedural or submission-related instructions specific to your company or this project. For example:
Proposal Format: Proposals must be submitted in PDF format, not exceeding 25 pages (excluding annexes).
Language: All submissions should be in [working language, e.g., English].
Submission Deadline: Late submissions will not be considered unless an extension is formally granted.
Ownership of Materials: All materials and deliverables produced during the project will become the property of [Company].
Validity Period: Proposals must remain valid for a minimum of 90 days from the submission deadline.
Right to Reject: [Company] reserves the right to accept or reject any proposal, in whole or in part, without providing a reason.

8.6 Key contact

Alex Johnson

Director of Strategic Initiatives

alex.johnson@company.com

Phone: +123-456-7890

9 Associated Documents

If needed, associated documents