

The Elearning List

Guide to Writing a Request for Proposals for Elearning Services

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<https://www.elearninglist.com>



Purpose

The document is aimed at training buyers and anyone responsible for procuring external services for the delivery of elearning solutions.

It provides a guide to the sorts of information that suppliers of elearning products and services need in order to be able to provide a good quality proposal or quote.

This in turn will help ensure as a buyer you get the best solution for your needs, and at the right price.

Introduction

The process of getting the right elearning solution for you starts with having a clear understanding of what you are looking for.

Once you have that you can communicate it to potential suppliers in many different ways. If you want to be able to directly compare solutions from different suppliers, then one common way to do that is to issue a Request for Proposals (RFP) or Invitation to Tender (ITT).

A well written RFP can convey a lot of useful information to potential suppliers in a relatively short document. On the other hand a poorly written one can take a lot of words to say very little that can help the supplier decide how they can best respond.

There are many ways to write an RFP, and some organisations have their own standards. What we have done here is suggest one way of structuring an RFP to provide potential suppliers with the kind of information that will be most useful to them in putting together proposals that best meet your needs.

You may of course find that some of the suggested information does not apply to your situation. Don't worry about it, simply use the parts that make sense to you.



Section 1: Description of Your Needs

This first part of the RFP describes what you are looking for from the successful vendor, put in the wider context of your organisation.

Summary Statement of Need

It is always good to open with an executive summary. This should be a short statement, maybe even a single sentence, that provides an overview of what you want.

For example:

“We are looking to train and test 1000 sales people in 50 countries on our new product in the six weeks immediately prior to launch in October.”

The idea here is to set the context for the rest of the document, so it should focus on the most important aspects of your project and its goals. Without this it is surprisingly easy for it to get lost in the details.

Overview of Your Company and Industry

This section is about giving the supplier some contextual information about who you are and what you do. Focus on practical, factual information rather than sales or marketing material.

You may be well a known brand, but you should not assume people understand your business. Big businesses are complex, and different parts of the organisation can have very different needs. It is very easy for outsiders to gain a false impression based on general awareness of a major brand. There is often industry specific information or terminology that you take for granted, but potential suppliers may know nothing about or could easily misinterpret.

You don't need too many specifics but a few paragraphs of background information, and pointers to other sources, like your website, can be very valuable. It should be enough for someone with reasonable business



knowledge, but no understanding of you or your industry, to understand your requirements in the context of how your business works and what your key priorities or success drivers are.

The Business Problem or Issue to be Addressed

This deals specifically with the reason for your RFP and the more detail about this you can provide the better the quality of the responses you will get. Which will make the job of choosing the best supplier easier for you.

If you have had to write an internal business case to approve investment in the project, this would be the ideal place to start. However, such a document will most likely need to be edited for external use.

A simple example would be:

“We are looking to reduce the growing costs of customer care for our software product by providing online training modules which will reduce the overall number of calls made to our customer care hotline by 60% per customer.”

Size of the Problem/Value of the Solution

You could simply indicate what your approximate budget for the project is. Or you could define it in terms of target cost savings or the value of productivity improvements.

There are often many different ways to solve a problem, at many different budgets. You don't want to waste your time reading proposals that either vastly under or over estimate what you are prepared or able to pay for.

If you have a fixed budget, then the difference might come in what each supplier can deliver in that budget. Alternatively your requirements might be more fixed and your budget flexible, if so you need to be clear about this.

When establishing a budget it can be very easy to get your estimates of costs very wrong. This can result in overpaying for a solution, but more often you end up asking for more than is possible to deliver within what you can pay.



Therefore it is important to set out both absolute limits, and what may be open to negotiation.

If you are unable or unwilling to be precise about budget, you need to give suppliers an idea of scale in terms of the number of people who will use the solution, which will help them to cost out the solution. This might be the number of people who will access a course, test or a wider platform like a Learning Management System (LMS). If you can put that information in terms of a time frame, that will be even better.

For example:

“We want to create a company induction programme for new employees consisting of about 10-12 hours of content, including text, audio and some video. We have some 500 people to put through the programme each year, and we want them to complete all parts of it in 2 weeks from joining the company.”

Your View of the Best Solution or Outcome

Depending on how much experience you already have with elearning, or the research you have done for this project, you may already have some idea or vision for an ideal solution.

You may have already decided that you want a blended solution, rich video or some element of social collaboration built in. Spelling this out can save suppliers a lot of time in their response. It can also save you a lot of time by avoiding sifting through solutions that you have already decided are inappropriate.

Alternatively you may have specific objectives or targets that you need to meet. We have already seen an earlier example of reductions in support call handling, but it might also be about particular skills or knowledge that need to be acquired to a set standard.

Sometimes you might be looking for a solution based on achieving compliance with industry standards or other external regulatory requirements. If so, this is very useful information, however be aware that not all providers who can offer



you a solution will have knowledge of such industry specific needs, so pointing them towards any external sources of information there might be would be very helpful.

Of course when it comes to compliance training, especially in more established fields, you are much more likely to be purchasing something that is at least in part an off the shelf solution. This is good because it can save money, but you should also spell out if there are specific additional requirements that need to be met, beyond the passing of a standard exam or certification test.

Negotiable/Non-Negotiable Elements and Constraints

It is important to be clear about what your 'must haves' are and the other areas where you are prepared to negotiate or respond to creative ideas. This will enable vendors to present solutions that you might not have considered whilst still meeting your core needs.

Required Time Scales for the Delivery of the Solution

Let the suppliers know about any specific deadlines they will need to meet. It is also useful to explain why those deadlines are there. They might need to coincide with other events in the organisation or it might be due to budgeting reasons.

Sometimes deadlines are absolute, other times they might be flexible, and you may want suppliers to either commit to your deadline, or explain why they can't so you can take this into account in your decision making.

The last thing you want to do is choose a supplier with a perfect solution, and then find out they can't deliver it until it is too late.

However, sometimes deadlines are less important than the quality and fitness of a solution. If that is the case with your project, you can spell this out too. There is often a time/cost/quality trade off to be made, especially with bespoke developed solutions, so it is important to let your suppliers know which of these is most important to you.



Your Existing Elearning or Technology Infrastructure

If you are looking for courses and you already have an LMS that they will be loaded into, it is useful to let suppliers know this. If you want to have the solution on your own servers there will almost certainly be some technology constraints which could limit the range of solutions you can use.

You also might want to integrate your new LMS with an existing HR information system. This would most likely have delivery implications which you should highlight so the supplier can take it into account, and verify that they have the necessary skills.

Of course it is increasingly common for solutions to be provided on the Software-as-a-Service (SaaS) model, which can simplify things a lot, but does not eliminate all obstacles, including the need for some technical integration.

A common example is the need to use existing network user identity standards so your users can access the solution seamlessly through a technical integration known as Single-Sign-On (SSO).

Whatever the case, this is the part of your RFP where you will almost certainly need to involve your IT team for their input. You want to avoid a scenario of finding a great supplier, spending time negotiating a great deal, only to discover they do not meet the requirements for your IT security policy.

Your Existing Resources or Internal Expertise

Do you have internal trainers who will be involved in delivering blended courses? Existing training material you will provide to convert to elearning? Or do you have subject matter experts whose knowledge will form the basis for a course?

Clearly there are potential savings if you are bringing some existing resources to the project. You will also likely have several decision makers and stakeholders either as part of your internal team that the supplier may need to work with at some point during the project.



Terms and Conditions

If you anticipate using your own form of contract, then you should include a template in your RFP. However, even if not you might have certain sets of terms and conditions your business adheres to, such as invoice terms, payment schedules or intellectual property rights (IPR).

You might be subject to certain legal regulations, such as the treatment of learner data or laws on accessibility of training material. You cannot assume that all suppliers will be subject to or even fully aware of these, which may impose additional costs or change the nature of the service that can be provided. So it is important to include all such information here.

Bigger organisations of course have procurement teams and legal teams that may be involved here, but the most information you provide here about specific constraints that suppliers will have to adhere to, the better.



Section 2: Format of Response

This section covers a description of the information you need from the supplier in order to evaluate their solution. This includes both the specific services they will supply to you, but also some more general background about who they are, which will help you decide whether or not they can deliver on their proposal.

About the Solution

You should expect a supplier to be able to write a proposal that addresses your needs and gives a quote or at least an indication of the price of their services to form the basis of a contract negotiation.

However, it is also a good idea to prescribe how that information is presented to you. Using a highly structured format will make it easier to compare responses from different suppliers.

For example if you are looking for an LMS and you have specific feature requirements, you might list them all in a table and require an indication whether each feature will be provided as standard, as a custom element, or is not available. You might also include in this whether each is Must or Nice to Have.

Such a high degree of structure may however, be less appropriate if you are looking for a bespoke course solution that calls for more creativity in the design. In that case you may want to leave more room for suppliers to demonstrate their unique qualities.

Whatever your situation you are still likely to want certain information from every supplier about their solution in order to evaluate it, so be as clear and detailed as possible.

Mocks, Examples or Trial Access

Think also about evidence they could supply in support of their proposal. This



might vary of course based on the type of solution. For a bespoke project you might ask for examples of previous work, or initial visual concepts for your solution. When looking at either a platform or available courses, then you would expect to have trial access for evaluation purposes, as well as being able to explore any possible customisation options. You may want to specify how long a trial should last, and how many people should be able to access it.

Reference Customers

Do you want references from other customers you can contact to get feedback from? This might be important particularly for larger scale projects and long term relationships, though it can exclude new, innovative businesses if you are not careful. If you are going to contact customers, be clear about this and when it might happen, so there is time to get their agreement on it.

Costs

Of course you will want to know what the solution is going to cost. However it is a good idea to make sure you get more information than just a headline figure.

Getting suppliers to break down their costs, particularly in complex projects, enables you to make rational choices, weighing up the benefits of different features or elements of the proposed solution against their cost.

This is particularly useful if the costs turn out to be much higher than expected or budgeted for, as it will help you to identify potential savings to be negotiated.

In some cases, especially where you are looking for a bespoke solution, it can be difficult, despite all the detail you provide, for a supplier to give you a definitive fixed price. Therefore it is a good idea to require them to spell out their assumptions and any dependencies or uncertainties in their costing.

You might also ask them to explain how those uncertainties can be reduced or eliminated. In this way you can go some way to protecting yourself from unexpected additional costs during the delivery of the project.



General Information About the Supplier

It is a good idea to get some more general background information about the supplier. It is useful to know about their size, like employee numbers, turnover or other financial information. This helps to establish if they are the right size for you.

Are they big enough to meet your needs, perhaps for more projects in the future. Conversely, and perhaps especially if your project is relatively small, you might want a supplier that is not so big that you may be low on their list of priorities.

How long have they been in business? Who are their other clients? What else do they do? Answers to these questions can be very useful. In many cases you will be entering into a long term relationship with your chosen supplier, so the more you know about them the better.

Suppliers of course are usually not shy in giving you information about themselves, but its about making sure its the right information for you to be able to make a judgement on them. Especially important in some cases can be the ability to demonstrate they meet certain certification or legal requirements.

Sample Contracts

If you anticipate forming an agreement based on the suppliers' own contract terms, make sure you ask for a copy.

If you have spelled out any particular terms and conditions in your requirements section (see above), then you will want to make sure those will be covered.

You may of course have a legal team that will review any supplier terms as part of the process. If so you should make this clear. Negotiations over contracts can take a long time and risk delays to projects getting under way, so it is important that any processes around this can start as soon as possible. You may also find that there are 'red lines' that neither party can cross and would mean you would have to eliminate particular suppliers on this basis regardless of the quality of the rest of their solution.



Section 3: Your Decision Process

Finally you want to explain the general process and decision steps you will go through to come to a decision.

Where Should the Response be Sent, and How?

Don't forget to tell people how you want to receive the response. Is email delivery sufficient, or do you need hard copy?

In more formal procurement procedures there can be rules about how envelopes are marked up, and sometimes you want prices separate from the main proposal so you can evaluate the solution on its own merits, and only consider the cost at the end of the process.

How Will You Evaluate the Responses?

Some organisations use scoring systems that give different weightings to different aspects of each supplier's response, others are much less formal.

Explaining your process, evaluation method and priorities helps suppliers to understand where to place the emphasis in their proposals, which in turn helps ensure you get the best information on the aspects that are most important to you.

How many suppliers are you inviting? Will you evaluate purely on a written proposal? Or will you invite a short list, or all suppliers, to present as well? A lot of business is conducted purely online of course, but you may want or require some level of in-person visit, either as part of your evaluation or delivery. It is good to make this clear so that there are no surprises later. Unbudgeted visits are one of the things that can push up costs by a surprising amount, for one side or the other.



Is there an opportunity to ask questions about the requirements?

Sometimes you may not want to engage in Q&A before proposals are submitted, but in many cases it is very useful to help to clarify what you are looking for.

You might invite suppliers to meet to discuss any questions, or simply submit them in writing. If you do the latter, will you share answers with all suppliers, or just those that posed the question?

Timetable

Finally you want to let suppliers know what your decision making timetable is. Set a deadline for responses of course, but also let them know when you will be making your decisions, and when you want the project to start.

In Conclusion:

We hope that this document has given you some ideas about the sort of information to put into an RFP for an elearning project.

Putting together an RFP can be a time consuming exercise and people sometimes find it a difficult process, especially when there might be a number of different stakeholders involved.

However a well put together set of requirements serves two important functions for the buying organisation.

First, it enables you to more accurately compare the services and prices from different vendors, because you have provided them with the same information.

Second, and just as important, it enables you to stay in control during both the procurement and the delivery. When your requirements have been clearly communicated it is much harder for vendors to either try and change your mind



to suit their needs or offering, or to claim during the delivery that the requirements were unclear. Both those situations can often end up with you paying more than you intend, or need to, for your elearning.

So by maintaining that control, you are in a much better position to realise the benefits and return on investment in your e-learning.

About The Elearning List

The Elearning List is the leading marketplace for connecting people and organisations looking to invest in elearning solutions with potential suppliers.

Buying organisations can submit requirements or a full RFP to the site free of charge and obtain responses from leading elearning solution suppliers.

For more information please visit us at [elearninglist.com](https://www.elearninglist.com) or send an email to: customerservice@elearninglist.com