Module 4: Writing an E-Learning RFP

The RFP Writer’s Predicament

Can you relate to this Training Manager?

**Training Manager:** “We’re often surprised when we receive vendor proposals. There’s just no consistency. One e-learning vendor proposes a set of template-driven web pages with multiple-choice questions for $25,000; another vendor proposes computer simulations, custom video, and a testing engine for $300,000. How are we supposed to choose? Comparing them is like comparing apples and...well...car parts.”

Though it’s easy to blame e-learning vendors for disparities in pricing and proposed solutions, there are some things you can do to get more consistent results. One reason vendors often submit radically differing proposals is that they have differing interpretations of your Request for Proposal (RFP). In this section, you will learn what information needs to be included in your e-learning RFP. With a better RFP, you will be able to compare apples with apples.

**Notes:**
An RFP Template

With input from our clients and colleagues, from industry publications, and from our experience responding to RFPs, we have developed an RFP template for you. The template provides a basic framework for the types of information you should include. It also contains examples and suggestions. Please go to the Briefcase to download the RFP Template, print it, and keep it handy as you navigate through the course.

The Big Five

Sorry to disappoint you college basketball fans. This Big Five has nothing to do with Philadelphia's legendary Big Five Tournament. Coincidently, though, e-Learning RFPs generally contain information related to these five major categories.

- **Proposal Submission** - Describes your administrative requirements for submitting proposals, such as deadlines, submission procedures, and minimum requirements.
- **Business Drivers** - Describes your business need, your project goals, and your success measures.
- **Product Requirements** - Lists your specifications for the kind of e-learning course you need developed... its features and capabilities.
- **Technical Requirements** - Details the technical requirements for the course... this is information that the techies will need in order to make your course run properly.
- **Process Requirements** - Describes aspects of the development process that you would like vendors to factor into their proposed project plans, such as milestone dates, deliverables, and resources.
Proposal Submission

The Proposal Submission guidelines provide an opportunity to tell vendors what you want their proposals to contain, so it is a great opportunity to influence the quality and consistency of proposals. Our template breaks up this section into three subsections.

- **Submission Process** – Do you want the proposal submitted via e-mail or by regular mail? When is the deadline for submission? When will you make a decision? How soon do you expect the work to start?

- **Minimum Requirements** – What are the minimum elements you expect to see in the proposals? Here you want to be specific in asking for things like a proposed project plan or a fee breakdown (e.g., fees by course feature). Vendor proposals that do not meet the minimums can be discarded immediately.

- **Selection Criteria** – As you write your RFP, you should establish criteria for reviewing and selecting the winning proposal. You might ask yourself, *what are the top 10 factors that will decide the matter?* Price is usually at or near the top, but if you think it through, you will find that there are other critical factors as well.

**TIP:**
Provide your vendors with ample time to respond. Some feel that a mark of a good vendor is their willingness to drop everything and respond to impossible deadlines. In fact, only vendors who have nothing to drop are likely to respond quickly. The better ones are too busy managing their projects successfully. Also, a high quality vendor will want to think through your needs and respond thoughtfully to them. Their proposals are likely to be lengthier, contain more substance, and involve input from a variety of people.

Notes:
Business Drivers

In this section of the RFP, you describe the rationale for your project. What is this e-learning course intended to accomplish? By clearly describing your business needs, goals, and metrics, you place the burden on vendors to generate a proposal that addresses those business drivers.

- **Business Need** – What organizational problem or opportunity is this course meant to address? Your salespeople might be underperforming those of your competitors within the first 2 years on the job. Knowing this helps the vendor understand the broader business context for the course, and better vendors will put this insight to good use in their proposed designs.

- **Performance Goals** – What specific performance behaviors need to be developed, changed, or improved? To address consistency issues, your information systems team developed a set of global standards. A performance goal might be for IS professionals to write system specifications that are in compliance with the global standards. Always think in terms of what learners will need to do differently.

- **Business Metrics** – What numerical metrics or success indicators will let you know that the performance goals have been met? Your customer support representatives need to improve their problem resolution speed. This could be represented by the time from when the call comes in to when the problem is resolved to the customer’s satisfaction. What is the baseline and what is your target? Communicating this to vendors reinforces the notion that you are keeping score and will hold them accountable for results.

Notes:
Product Requirements

At the heart of the RFP is the section describing product specifications. What features, capabilities, and attributes are important to you? We’ve found that there are three course attributes that rise above all others in importance:

- **Interactivity** – Most of us can agree that a course should engage the learner, stimulate thinking, and sustain the learner’s interest. What specific interactivity elements do you wish to see in your course?

- **Contextualization** – Most of us recognize that learning experiences should be relevant to the audience and to the work setting and should be meaningful to the learner. To what extent will your course content be contextualized to your audience’s work and work setting?

- **Media** – We can generally agree that e-learning should involve more than just reading text on a screen, but do graphics, audio, animations, video, and other media really help learning? They can when used effectively. What media elements would you like to see employed in your course?

**Notes:**

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**Note:**
Translating Interactivity, Contextualization, and Media into specific course features and capabilities can be difficult. For more on that, download our ICM Model white paper from your Briefcase.
Technical Requirements

Before you complete this section, get help. Find someone in charge of managing your organization’s computer technologies and buy that person lunch. You will need that individual’s support throughout the project. Here are some things you should discuss with your new-found friend:

- **Delivery Requirements** – These give vendors a sense of the technological platform from which the e-learning course will be launched. There is a big difference between launching a course from a CD-ROM and launching it online via a Learning Management System (LMS).

- **Minimum Platform Requirements** – Describes the system where the course will operate. The platform includes the hardware, operating system, browser, and any plug-ins your trainees are likely to have.

- **Development Software** – Identifying the software to be used by the developers to author your course helps reduce differences among proposals. As the Tip points out, it can also prevent maintenance problems with the course.

### TIP:
Beware of vendors who use their own proprietary development languages or authoring tools. While this may cut down on development time and costs initially, there are long-term maintenance consequences. It means that you will always need to return to the same company for updates and changes, even if you are dissatisfied with their service. There are many excellent, easy-to-use tools on the market that are common among vendors. Insist that your vendor use standard authoring tools.

**Notes:**
Process Requirements

Each organization has its own unique culture and so each one has different norms for managing projects. Some have very formal structures and processes; others fly by the seat of their pants. Over time, your selected vendor will get to know how you operate and will adjust. For vendors new to your organization, it is valuable to set expectations for how you will work together. Your RFP should include information to help vendors understand how your organization works.

- **Work Products** – Aside from the main deliverable, the e-learning course, what work products will you expect to see from the vendor? Do you expect the vendor to develop the Project Plan, to supply weekly progress updates, or to develop a prototype of the course?

- **Roles and Responsibilities** – What types of resources will you assign to the project and, more importantly, what resources do you expect the vendor to provide? What are their roles on the project? How many hours per week will they be dedicated to the project? What are their hourly rates? What are their credentials?

- **Review Cycles** – The number and length of review cycles are key drivers for project costs and timeframes. Who will review and approve work products and deliverables? What do you expect that review process to include?

**Notes:**

**TIP:**

Involving your procurement people early in the process. The procurement department often has experience developing contracts and writing RFPs. They will know the proper procedures to follow, the necessary language to include, and other items that may get overlooked. If you involve them too late in the process, they may become an obstacle rather than an asset.
Check Your Understanding

**Matching Exercise** – Match the RFP section on the left with its contents on the right.

<table>
<thead>
<tr>
<th>RFP Section</th>
<th>Contains your expectations for...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Submission</td>
<td>Due dates, formatting guidelines, required information, and selection criteria</td>
</tr>
<tr>
<td>Business Drivers</td>
<td>Business needs, performance goals, and metrics that need to be addressed</td>
</tr>
<tr>
<td>Product Requirements</td>
<td>Interactivity, contextualization, and media specifications for the course</td>
</tr>
<tr>
<td>Technical Requirements</td>
<td>Minimum platform requirements and development tools</td>
</tr>
<tr>
<td>Process Requirements</td>
<td>Expected work products, roles and responsibilities, and review cycles</td>
</tr>
</tbody>
</table>

**Summary**

A well-written RFP reduces ambiguity about your expectations for the product and the process. Vendors are then better-able to interpret and address your needs in their proposals. Proposals are more likely to be similar to one another, which makes it easier to compare and contrast on critical issues like price, experience, capabilities, and design recommendations.