

# Scope Development 101 for the Most Common FM Contracts



# Outline

- 1. How important is the SOW?**
- 2. Balancing Act: Too Open-Ended vs. Overly Prescriptive**
- 3. Tips for Writing an Effective SOW**
- 4. Request for Needs (RFN) – for new, complex, or risky projects**

# Mission

- Group of **researchers and educators**
- Integrate with **all parties** (owners & suppliers)
- Developed tools to **enhance** project delivery:
  - Procurement & Sourcing
  - Planning & Risk Management
  - Performance Measurements & Project Controls
  - Organizational Transformation



20+ Years | 100+ Owners

3,000+ Projects | \$15+ Billion Procured

## Information Technology

Networking      Help desk services  
Data centers      eProcurement  
Hardware  
COTS software  
ERP systems

## Facility Management

maintenance      custodial  
landscaping      conveyance  
security service      pest control  
building systems  
industrial moving  
waste management  
energy management

## Health Insurance/ Medical Services

## Manufacturing

## Business / Municipal / University Services

dining      retirement fund  
multi-media rights      material recycling  
fitness equipment      bookstores  
online education      furniture  
document management  
property management  
audiovisual  
communications systems  
emergency response systems  
laundry

## Construction / Design / Engineering

Infrastructure	Renovation	DBB
Municipal	Repair	CMAR
Laboratory	Maintenance	DB
Education	Roofing	IDIQ
Hospital	Demolition	JOC
Financial	Development	Low Bid
Specialty	Supply chain	IPD



Environment Protection Authority Victoria



uOttawa



**What is the Relationship  
Between the SOW and the  
RFP?**

# Terminology

## All are Included...

- **Scope of Work (SOW) or Statement of Work (SOW)**
- **Specifications or Minimum Specs**
- **Requirements or Minimum Requirements**
  - **Business Requirements**
  - **Technical Requirements**
  - **Functional Requirements**
- **Minimum Qualifications**

**SOW =  
What you are  
Hiring the  
supplier to do**

# Solicitation Document

## Solicitation

---

### Contents

---

- Section 1 Scope of Work
- Section 2 Evaluation Criteria and Procedures
- Section 3 Administrative Requirements
- Section 4 Submittal Forms & Exhibits

# 1) Prepare & Advertise

## Procurement Process

### Solicitation



#### Contents

- Section 1 Scope of Work
- Section 2 Evaluation Criteria and Procedures
- Section 3 Administrative Requirements
- Section 4 Submittal Forms & Exhibits

# Vendors Submit Responses

## Procurement Process

**Solicitation**

---

**Contents**

- Section 1 Scope of Work
- Section 2 Evaluation Criteria and Procedures
- Section 3 Administrative Requirements
- Section 4 Submittal Forms & Exhibits



# 2) Evaluate Responses

## Procurement Process

**Solicitation**

---

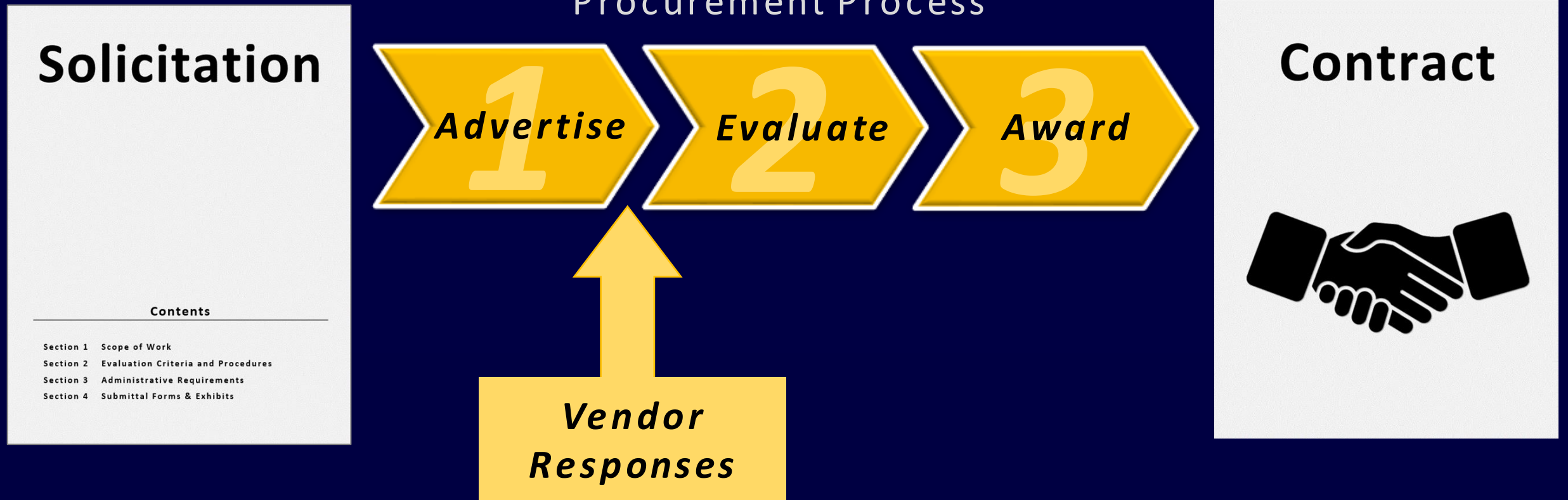
**Contents**

- Section 1 Scope of Work
- Section 2 Evaluation Criteria and Procedures
- Section 3 Administrative Requirements
- Section 4 Submittal Forms & Exhibits



# 3) Award Contract

## Procurement Process



# Solicitations Contents

## Solicitation

---

### Contents

Section 1	Scope of Work
Section 2	Evaluation Criteria and Procedures
Section 3	Administrative Requirements
Section 4	Submittal Forms & Exhibits

- 1) Scope of Work
- 2) Evaluation Criteria & Procedures
- 3) Administrative Requirements
- 4) Submittal Forms & Exhibits

# Industry Acronyms



# **3 Types of Solicitations**

## **Based On**

## **Award Factors**

# 3 Solicitation Award Factors

1. Award based on **Cost only** (*ITB, IFB, RFB, RFT*)



2. Award based on **Qualifications only** (*RFQ, SOQ, QBS*)



3. Award based on **Cost & Qualifications** (*RFP*)



# Consider 4 Project 'Traits'

**ITB**

*Cost Only*



**RFP**

*Best Value*

*Low \$*



*Value*



*High \$\$\$*

*Simple*



*Complexity*

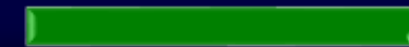


*Complex*

*High*



*Expertise*



*Limited*

*Low*

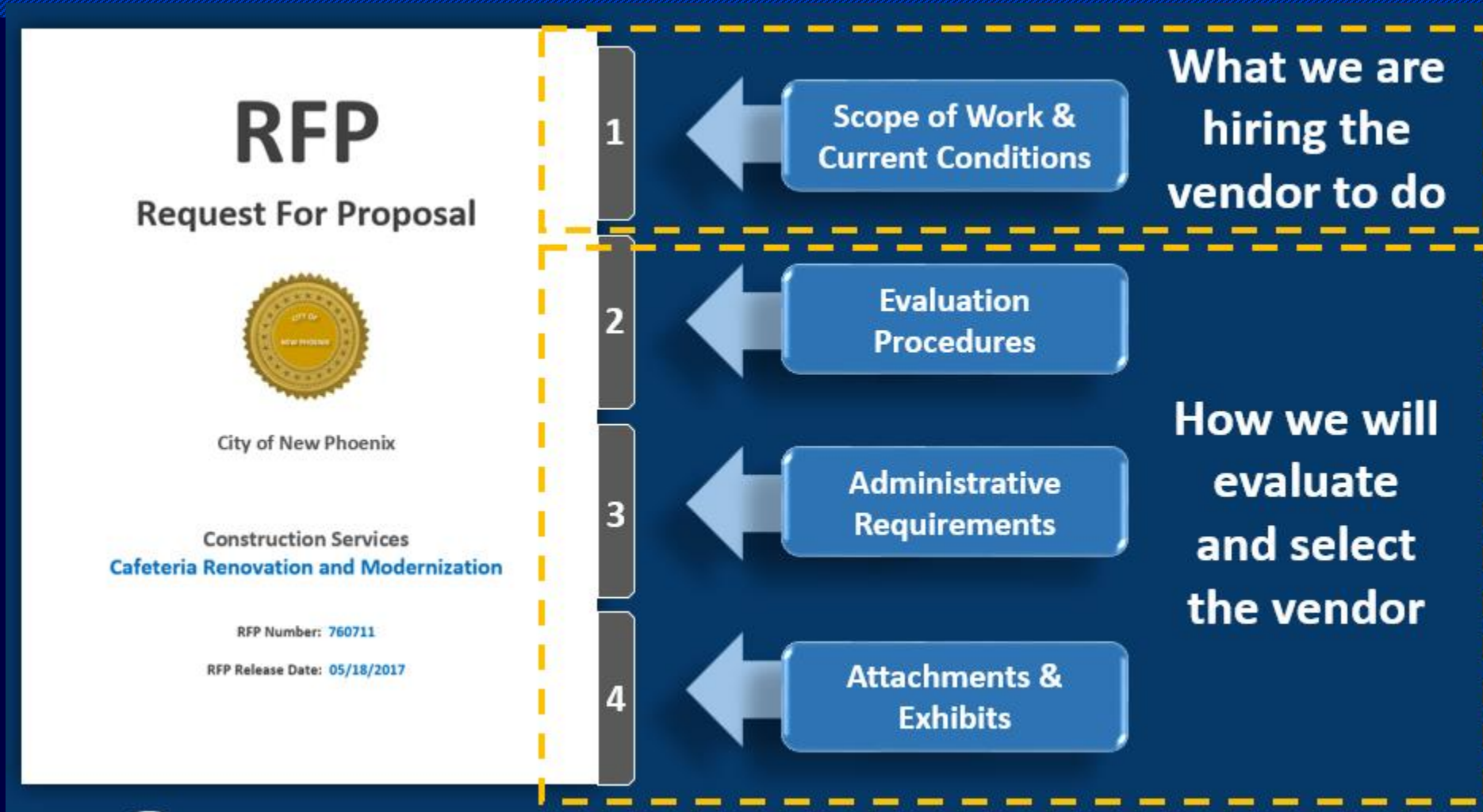


*Politics*



*High*

# SOW vs Other Sections



**How Important is the SOW?**

# Impact of a Poor SOW

## *Perceptions of Owner SOWs*

- **Unclear**
- Information is missing
- **Overly prescriptive**
- Unrealistic
- **Discourages innovation**
- The owner is “fishing”
- **Misunderstands Needs**
- *Procurement is Not Fair*

## *Impact*

- **Fewer proposals**
- Low quality proposals
- **Less qualified teams**
- Less competitive pricing
- **Less consistent pricing**
- Open to interpretation
- **Have to believe the supplier**
- *Brings Risk to the Project*

# Observations

## Impact of the Scope of Work

Quality  
of Scope



- ↓ Number of Proposals
- ↑ Number of Questions & Addenda
- ↑ Cost Disparity
- ↑ Eventual Change Orders

# Scope Definition vs. Cost Variation

## Scope Definition

Poor

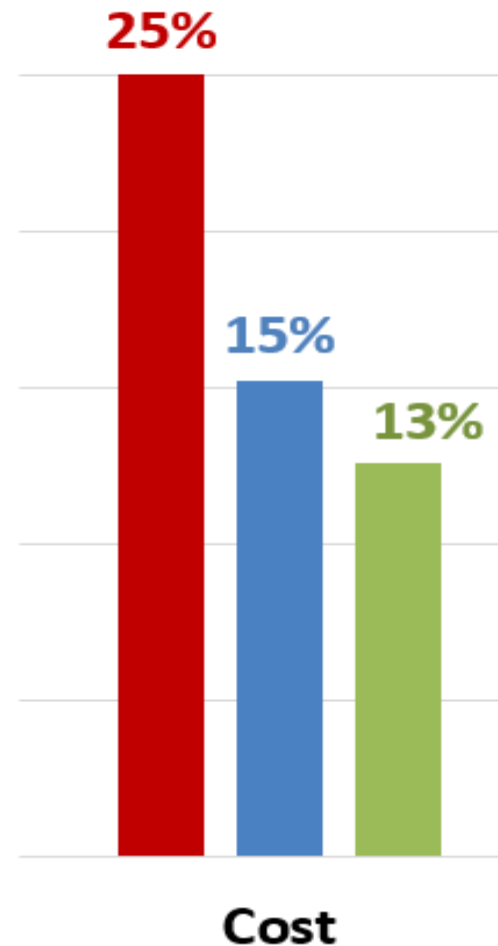
Moderate

High

347 projects

1,850 individual proposals

Variation  
between  
Cost  
Proposals



# Frustrations with Scoping

- **Can be very challenging.**
  - What to put in?
  - What to leave out?
  - How much detail?
  - What details?
  - Don't know what you don't know...?
  
- **Users have a hard time preparing the scope.**
  - Too busy
  - Too detailed
  - Too technical
  - Too prescriptive
  - Don't know where to start



# Common Challenges (from Procurement's Perspective)

- 1. Favorite – Customers don't see value since they have something/someone already in mind**
- 2. Timing – Customers are busy & might not be able to focus**
- 3. Inexperienced – Customers don't know where to start**
- 4. Experience – Customer past experiences can create obstacles**

# Balancing Act:

**Too Open-Ended**

**vs.**

**Overly Prescriptive**

# Major Utility Group

- Full Technical Specification: “Pls dig a hol”



# Coal-Fire Plants: Safety Valve Maintenance Services

The scope of Services includes the supply of qualified and certified labour and equipment required to complete Pressure Relief devices services in accordance with [Owner's] registered Quality Management System Manual.

The services will be used on the Boiler Safety Valves, Pressure safety valves, Relief safety valves, Reclosing and Non-reclosing relief devices at [Owner's] discretion, for components within and/or outside of the jurisdiction of the Boilers and Pressure Vessels Act and Regulations.

The services will be mainly used for outage and overhaul work, and at [Owner's] discretion, may include call in for some emergency Services.

**1.0.1** The Services includes, but is not limited to:

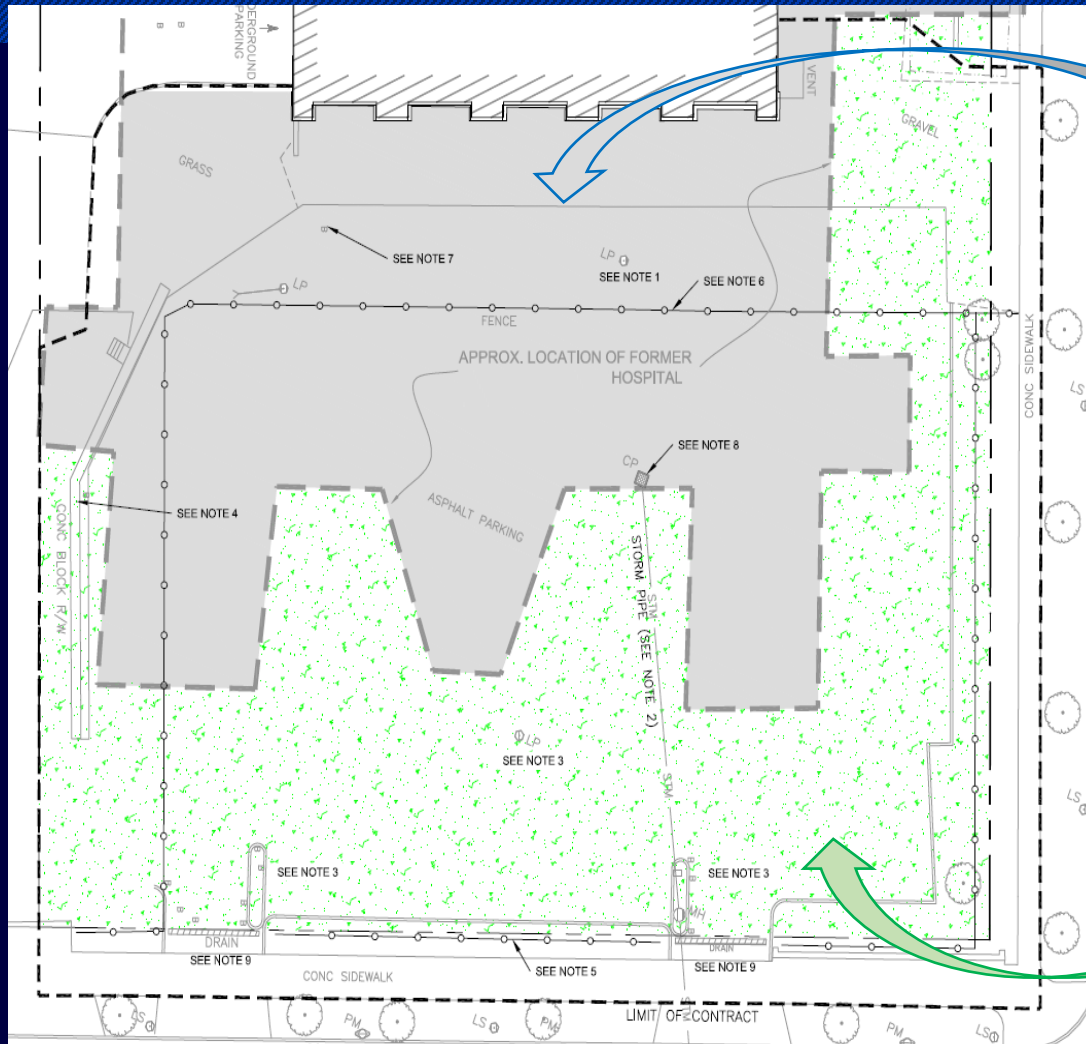
- a) In-service/in-place testing (Field testing) of Pressure relief devices- Electronic Valve Testing (EVT)
- b) Servicing of Pressure relief devices at [Owner's] site(s)
- c) Servicing and testing of Pressure relief devices at Contractors facility
- d) Refurbishment of Pressure relief devices at site or at Contractor's facility
- e) Provide all applicable documentation to [Owner] i.e. Service Reports, Manufacturer Data Reports etc.
- f) Providing sales representation of all types of valves
- g) Provide needed parts, fabricated by the relief valve manufacturer or to its design specifications, for all applicable Safety Relief Devices upon notification from [Owner] on scheduled and unscheduled maintenance.

- Which Power Plants?
- Historic Volumes?
- Client Goals and Objectives?
- Etc.

# Addicted to External Consultants?

- Many organizations respond by hiring consultants to develop the scope for them.
- Always remember – consultants will never know your needs, operations, and intricacies like you do!

# Site Excavation & Remediation



“Silt and sand soil, mixed with debris from the demolition of the hospital, and often underlain by a concrete slab or footings ranging from 1.8 to 3m thick.”

**No benchmark to bid to!**

“Primarily dark brown/grey silty sand with gravel.”

# Impact of Open-Ended / Unclear Specs on supplier Proposals

- Have to believe the supplier
  - Open to interpretation
  - Encourages the minimum
  - Less consistency in pricing (*wide range*)
  - Less competitive pricing (*increased contingency*)
  - Discourages suppliers from submitting
- **Brings Risk to the Project!**

# Waste Hauling SOW

5,000+ tons of waste collection across a city



- “An adequate fleet of collection vehicles should be used and maintained by the Proponent...”
- It is the [Owner’s] expectation that collection vehicles designated for service should at a **“minimum be less than two years old at the start of the contract”**

# Waste Hauling SOW

5,000+ tons of waste collection across a city



- In order to support accurate measurements towards the [Owner's] sustainability goals, all vehicles must be **solely dedicated** to [the Owner] and **cannot be used for other sites.**

# Waste Hauling

- Client's Budget: \$321,000 per year
  - Average Proposal Price: **\$469,000**
  - Maximum Proposal Price: **\$661,134**
- SOW was put together with great intentions – high quality services & impressive sustainability goals.
- Emphasis on the inputs (means & methods) may have detracted from the outcomes (results)?

# Elevator Maintenance (campus-wide)



- The Proponent shall assign a **dedicated maintenance technician** to this contract.
- This individual must be **solely assigned** to this contract and will perform all preventative maintenance & major repairs within the building zone.
- The dedicated maintenance technician shall be provided with office space within the building zone as their base of operations.

# Major Overhaul for a Power Plant (Minimum Qualifications)

- Minimum **10 years experience**
- At least **10 projects** in **Design-Build (DB)** contracts.
- Experience in working on behalf of **both** owners and DB contractors.
- Minimum of **5 DB projects in [specific State]**
- Must have completed **1 DB project** working on behalf of a **public owner**.
- Have completed **1 DB project** that was not new construction, but was a **refurbishment, remodel, or addition to an existing asset in a secure operating facility**.
- **And more certifications, credentials, etc.**

# Impact of Overly Prescriptive Specs on supplier Proposals

- Can significantly increase cost & schedule
  - Removes flexibility to offer strategies & innovations for the specific environment
  - “tie the hands” of suppliers regarding the work and manner in which it is undertaken
  - Limits the maximum accountability & responsibility suppliers have to perform
- **Brings Risk to the Project!**

# Common Questions



## What is **ASKED**

*“Does anyone have an **RFP** for a \_\_\_\_\_ contract I could see?”*

## What is **INTENDED**

*“I am not sure what tasks I need my new vendor to do – any recommendations?”*

## What is **NEEDED**

*“What major challenges do my customers face and how do I find an expert to help me solve them?”*

**EFFORT**

# Simpliar Scope Library

[www.simpliar.com/effective-sow/](http://www.simpliar.com/effective-sow/)

Need Access to our RFP / Scope Library?

Name

Email Address

Looking to cut procurement time in half? Need a specific type of RFP? Project is behind schedule?

Submit

# Tips for Writing an Effective SOW

What Percent of  
Scopes of Work  
Specifications  
Minimum Requirements  
RFPs, Contract Docs  
are 100% Accurate?

# What is an Effective SOW?

## Core Objective

What would an Expert supplier need (or want) to know?

ALWAYS question whether the SOW....

- Allows suppliers to provide the **best price**?
- Gives suppliers **information to plan** their approach?
- Enables suppliers to **minimize contingency**?
- Prevents suppliers from **walking away**?

# SOW Development

- What are the basic elements that we need to include and address when preparing a great SOW?
- So how exactly do we do it???
- Let's take a look...

# What is an Effective SOW?

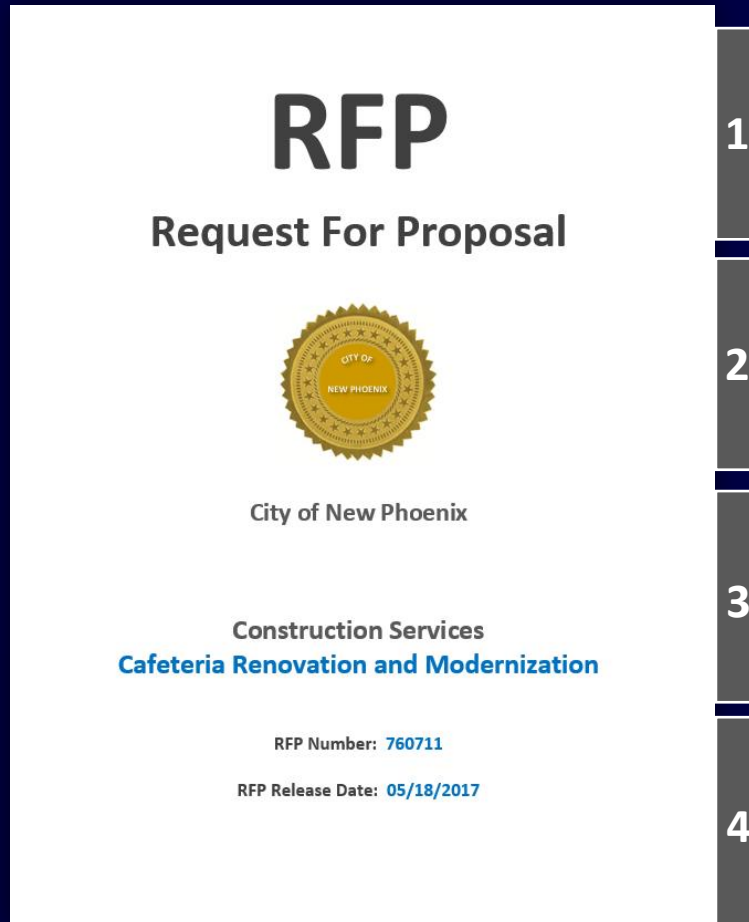
## Core Objective

What would an Expert supplier need (or want) to know?

ALWAYS question whether the SOW....

- Allows suppliers to provide the **best price**?
- Gives suppliers **information to plan** their approach?
- Enables suppliers to **minimize contingency**?
- Prevents suppliers from **walking away**?

# Elements of the SOW



← Scope of Work & Current Conditions

1. Scope Summary
2. Current Conditions
3. Future State
4. Detailed Requirements
5. Schedule Requirements
6. Budget Requirements
7. Unique Considerations

# 1) Scope Summary

## CLEAR, READABLE SUMMARY

- **What you are looking to procure or achieve (high level)**
- **Be as brief and concise as possible - Aim for a few sentences to 1-2 paragraphs (max)**
- **It could be as simple as describing the goods or services you are looking to procure.**
- **Avoid any technical language, details, or specifics.**
- **A lay person with common knowledge should be able to understand what you are looking to procure.**

# 1) Scope Summary

## GOALS / OBJECTIVES / OUTCOMES

- It is important to help the suppliers understand what is the driving force & business need for having this project procured.
- Identify the major goals, expectations, objectives, or benefits of the new project or service.

# 1) Scope Summary

## KEY MEASURES OF SUCCESS

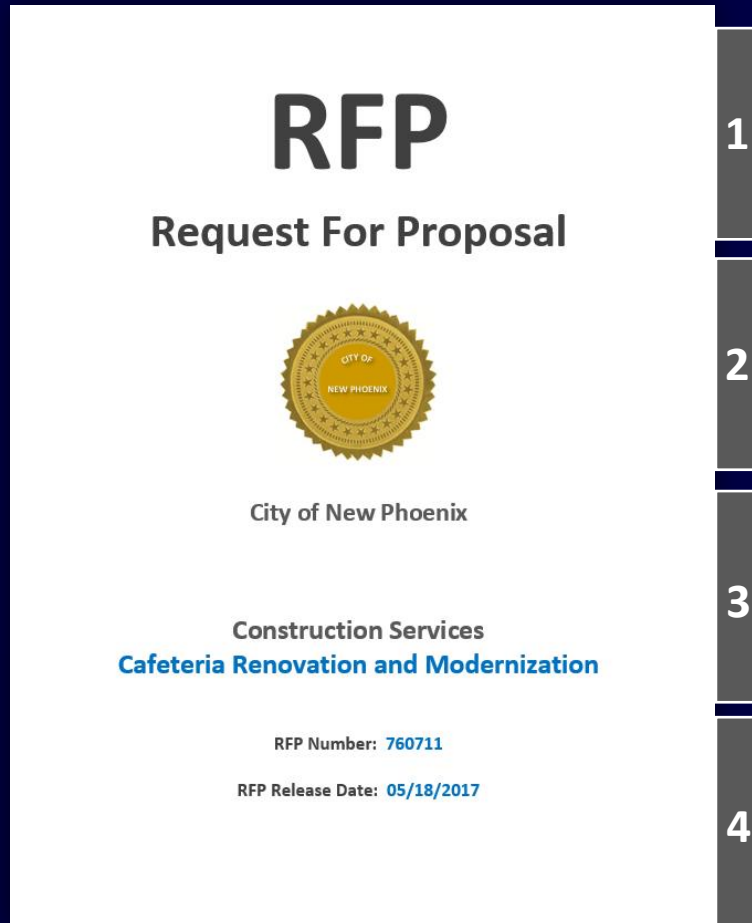
- 3-5 key objectives (max) that are **MEASURABLE**
- Focus on outcomes that are value-based:
  - Financial / Cost / Revenue
  - Time / Schedule
  - Resources / Effort
  - Capability / Service Levels

# 1) Goals or Objectives

- Goal = transport 5 children
- Goal = haul construction material & tow a trailer



# Elements of the SOW



Scope of Work &  
Current Conditions

1. Scope Summary
2. Current Conditions
3. Future State
4. Detailed Requirements
5. Schedule Requirements
6. Budget Requirements
7. Unique Considerations

## 2) Current Conditions

- Easiest to document
- Most critical
- Often skipped, ignored, missed



## 2) Current Conditions

- Overview to summarize current environment
- Pain Points with the Current State (suppliers ALWAYS ask about this!)
- Strengths of the Current State (if any, these are things that should be continued or built upon)

# 2) Current Conditions

- **Existing Users & Stakeholder Groups**
  - Profile
  - Involvement
  - Specific concerns, objectives, considerations
  
- **Volumes / Quantities**
  
- **Other Info → Don't Forget Reference Docs!**

# Elements of the SOW



Scope of Work &  
Current Conditions

1. Scope Summary
2. Current Conditions
3. Future State
4. Detailed Requirements
5. Schedule Requirements
6. Budget Requirements
7. Unique Considerations

# 3) Future State

- **Overview – narrative of what should be difference**
- **Reference Documents**

# Elements of the SOW



Scope of Work &  
Current Conditions

1. Scope Summary
2. Current Conditions
3. Future State
4. Detailed Requirements
5. Schedule Requirements
6. Budget Requirements
7. Unique Considerations

# 4) Detailed Requirements

- **Minimum Qualifications**
- **Tangible Deliverables, Products, Outcomes**
- **Resolution of Questions / Future Decisions / Future Action / Removal of Unknowns**
  - **Include Analysis Expectations**
  - **What decisions will we be informed / answered based the analysis**

# 4) Detailed Requirements

## Content:

- Definition of the “Future State” needs
- Focus on the MANDATORY Requirements
  - Requirements that MUST be met to achieve 100% satisfaction.
- Nice-to-Haves / Like-to-Haves can be described
  - But not critical!

# 4) Detailed Requirements

## Organization:

- Itemized
- Organized into major categories
- Attach (and reference) Exhibits to make this easier to follow (i.e. drawings, specs, pictures, diagrams, site plans, reference files, etc.)
- Do NOT need a written response for each requirement

# 4) Detailed Requirements

Vendor Instructions: For each requirement listed below please mark the appropriate column with a "1"							
Business/Functional Requirements - Retail		Enter "1" In The Appropriate Column					
Number	Requirement	Priority (Required or Preferred)	Out of The Box with Some Configuration	With Customization	Not Available	Native vs. Third-Party Application	If Third-Party Application, Insert Name
<b>Section 1: Data Feeds and Inputs</b>							
1 1	The system shall provide the capability to load daily transactional information.	Required					
1 2	The system shall provide the capability to receive raw commission or reference data from external carrier or Waddell & Reed and put that data into a standard data layout.	Required					
1 3	The system should provide the capability to perform data validation checks based on defined rules or specified data fields and report any errors.	Required					
1 4	The system shall provide the ability to reload transaction files with matching Business Processing Dates already in the system and replace all data from the previous file with the data from the new file.	Required					
<b>Section 2: Plan Participant Management (Party Management)</b>							
2 1	The system shall provide the capability to support plan participant data being imported from or exported to an external system.	Required					
2 2	The system shall provide the capability for a business operation team to manually setup and maintain plan participants.	Required					
2 3	The system shall provide the capability to store and view multiple identifiers for plan participants (i.e. alphanumeric, 3 digit and 5 digit, SSN, etc.).	Required					
2 4	The system shall provide the capability to override the Advisor ID that is sent on a commission input and pay to a different Advisor ID (ie. Advisor ID should be OAB and is being sent incorrectly as OAB, need ability to override and pay to correct ID)	Required					
<b>Section 3: Compensation Plan Setup and Maintenance</b>							
3 1	The system shall provide the capability for a business operation team to create and administer all necessary components associated to multiple compensation plans in a manner that ensures consistency across plans.	Required					
3 2	The system shall provide the capability for compensation plan components to	Required					

Do **NOT** need a written narrative, such as:

“Please provide comments/supporting information to help explain how your solution addresses the requirement ”

# 4) Detailed Requirements

Attachment F - Software Functionality and Technical Requirements.pdf - Adobe Acrobat Pro DC

Home Tools Document 2 / 111 85.3% Sign In

This file claims compliance with the PDF/A standard and has been opened read-only to prevent modification. Enable Editing

STATE OF ALASKA  
Statewide Administrative Systems Replace RFP No. 2010-0200-9388

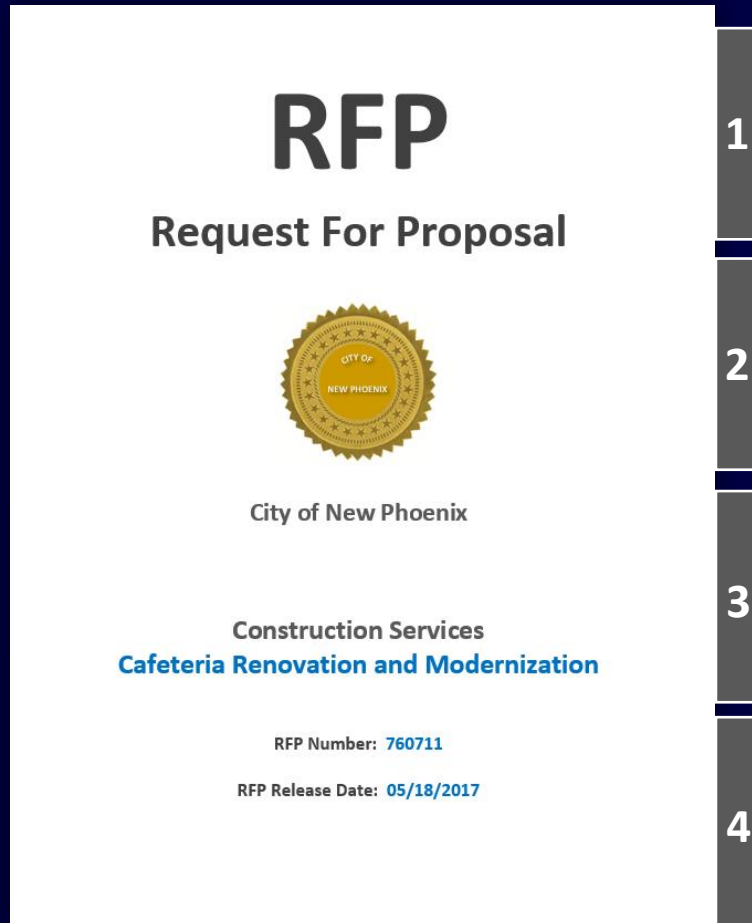
ID Num	Requirement Area	Requirement Subcategory	ID Num	Requirement Area	Requirement Subcategory	Requirement Name	Requirement
0100	Budget	Control/ Execution	5402	System and Technical	Workflow	Approval / Denial	System shall provide ability to define multiple approval levels for electronic transactions / documents / business events processing.
0101	Budget	Control/ Execution	5403	System and Technical	Workflow	Approval / Denial	System shall provide ability to restrict processing of electronic transactions / documents / business events until they pass all required approval levels.
0102	Budget	Control/ Execution	5404	System and Technical	Workflow	Approval / Denial	System shall provide ability to set up Approver Groups associated with electronic transaction / document / business event processing.
0103	Budget	Control/ Execution	5405	System and Technical	Workflow	Approval / Denial	System shall provide the ability to define a unique approval process for each user and type of document/business event.
0104	Budget	Control/ Execution	5406	System and Technical	Workflow	Approval / Denial	System shall provide the ability to specify multiple approvers for a document/business event where only one of the approvers listed must approve the document in order to consider the document approved.
0105	Budget	Control/ Execution	5407	System and Technical	Workflow	Audit Trail	System shall provide an audit trail of all adds, changes, and deletes to workflow rules.
0106	Budget	Control/ Execution	5408	System and Technical	Workflow	General	System shall ensure that any transaction, document or business event entered into the on-line system is reviewable prior to its saving / processing / commitment.
0107	Budget	Control/ Execution	5409	System and Technical	Workflow	General	System shall provide the ability to reverse / unwind processed transactions, documents and business events.
0108	Budget	Control/ Execution	5410	System and Technical	Workflow	General	System shall permit a minimum of 10 levels of approval that may be established for each type of electronic document/business event.
0109	Budget	Control/ Execution	5411	System and Technical	Workflow	General	System shall allow all authorized users to see the approval status of a document/business event.
0110	Budget	Control/ Execution	5412	System and Technical	Workflow	General	System shall assure that an employee is removed from and added to the workflow process based on qualifying events (e.g., termination from or appointment to agency, or transfer to another organization entity within the agency).
0111	Budget	Control/ Execution	5413	System and Technical	Workflow	General	If a user modifies an electronic document/business event, the system shall allow approvals to be reprocessed in accordance with business rules.
0112	Budget	Control/ Execution	5414	System and Technical	Workflow	General	System shall provide the ability to search/retrieve documents/records based upon user defined criteria.
			5415	System and Technical	Workflow	Notification	System shall include a workflow process, with notification options, for business events and documents.
			5416	System and Technical	Workflow	Notification	System shall provide the ability to re-route transaction/document/business event for approval based upon user defined criteria such as dollar thresholds or random selection for statistical sampling purposes.
			5417	System and Technical	Workflow	Notification	System electronic document management function shall be integrated with the State's electronic mail system or provide other means to alert "reviewer" of documents awaiting approval.
			5418	System and Technical	Workflow	Tracking Document(s)	System shall provide ability to track (e.g., identify, record, inquire, report) the progress of electronic transactions / documents / business events.

Attachment F - Software Functionality and

STATE OF ALASKA  
Statewide Administrative Systems Replace

100804 Alaska ... Module 2 RFP ... Synchronization...

# Elements of the SOW



Scope of Work &  
Current Conditions

1. Scope Summary
2. Current Conditions
3. Future State
4. Detailed Requirements
5. Schedule Requirements
6. Budget Requirements
7. Unique Considerations

# 5) Schedule Requirements

- **Important to clearly define any schedule constraints or expectations that you have (of the good or service).**
  - **Is there a required date the Project/Service must begin on?**
  - **Date that the Project/service must be completed by?**
  - **Are there any special dates or times that the supplier should be aware of that could impact this contract**

# Elements of the SOW



Scope of Work &  
Current Conditions

1. Scope Summary
2. Current Conditions
3. Future State
4. Detailed Requirements
5. Schedule Requirements
6. Budget Requirements
7. Unique Considerations

# 6) Budget Requirements

- The Budget is one of the single most important SOW descriptors
- Clarifies your technical scope (what you can afford)
- Clearly define any financial constraints or expectations that you have. Such as:
  - *The construction budget for this Project is \$150,000*
  - *The estimated spend for this Project is \$2 Million*
- Topic generates a lot of questions, so a separate discussion has been developed...

Should you issue the budget?

**YES**

**Read our  
white paper  
on the topic!**

# Elements of the SOW



Scope of Work &  
Current Conditions

1. Scope Summary
2. Current Conditions
3. Future State
4. Detailed Requirements
5. Schedule Requirements
6. Budget Requirements
7. Unique Considerations

# 7) Unique Considerations

- **Potential issues, risks, concerns, or challenges with this site, location, service, etc.**
- **Aspects that would make it more challenging or unlike than other projects the suppliers have performed.**
- **Anything else that could cause a potential surprise or pose a significant challenge**

# Additional Information

- **Project location**
- **Roles, responsibilities, and involvement (of the Owner) throughout the duration of this project/service**
- **Alternatives or options that you would like to consider**
- **Any assumptions that you have made**
- **List future conditions, outside of this scope that the supplier should be aware of**
- **List anything that is excluded from this project/service**

# An Effective SOW must be...

## Clear/Concise:

i.e. “I am looking to acquire an object that can transport several human beings from one place to another”

## Accurate:

“Looking to buy a car – not a bicycle, motorcycle, or private jet.”

## Complete:

“Oh, I forgot that I require 4 wheel drive and ability to tow a trailer.”

**Request for Needs (RFN):**

**For new, complex, or risky  
projects**

# Request for Needs (RFN)

- The “Silver Bullet” of SOW Development
- What to do when...
  - the Business doesn't know what to do
  - you don't feel good about what the Business prepared
  - the project is new, unusual, or complex
  - **You have an IT project of ANY kind!!!!!!!!!!!!!!!!!!!!!!**

Who Should Know **More**  
about delivering the  
Scope & Requirements?

Answer:  
**The Supplier  
is the Expert**

# Common Frustration for Suppliers:

**Clients who issue SOWs that are unrealistic, inaccurate, and/or inconsistent**

- **Because a poor SOW starts the project with a shaky foundation & can cause confusion in the solicitation process.**

*Issue an*  
***RFN***  
*to the supplier*  
***Community***

*But with the RIGHT intentions...*

# An RFN is NOT...

- Surveying general capabilities...
- Fishing for data...
- Seeing what's out there...

# Review of the RFN Document

- Fundamentally, an RFN can answer two types of questions:

## Overall Partnering Strategy

- Where should we draw boundaries on the scope?
- What are proper budget, schedule, and staffing expectations?
- Are the overall goals, phasing, and structure realistic?



## Details of Scope Definition

- Have we provided enough detail on the current state?
- Have we provided enough detail on the future state?
- Should we consider adjusting any requirements?

# RFN Process Steps

1. **Draft the Scope of Work. Distribute it to Suppliers along with the RFN.**
2. **Suppliers are requested to review the draft Scope and respond to the RFN with questions & recommendations.**
3. **Client will address as many supplier questions as possible in the final scope of work for the RFPs.**
4. **The RFP will be released with the updated Scope.**

# How to Prepare an RFN

1. **Create the Scope of Work Sheet**
  - Emphasis on defining Current Conditions
  - Include any objectives/requirements for the Future Conditions that will be different than Current
2. **Use the RFN Template**
  - Copy/Paste the draft SOW
  - Refine the RFN questions to meet project-specific needs

Run the RFN **in parallel** with RFP development  
= NO TIME LOST!!!!

# RFN Response – Critical Info

supplier responses may inquire about...

- Volumes, throughputs
- Occupancy
- Entry/Access
- Rules/regs/restrictions
- Schedules
- Current practices / ops
- Equipment condition
- Current service levels
- Stakeholder involvement
- Etc...

**Client answers as  
much as possible**

**=**

**Effective SOW  
is complete!**

**(gives suppliers what they  
want to know)**

# The RFN process can be very Fast!

## Example:

- **Friday:** created RFN (Draft Scope + RFN Template)
- **Monday:** Client advertised the RFN
- **Next Monday:** suppliers submitted RFN responses
- **Tuesday:** “Action Item” list for Client’s project team
  - *Suppliers even proposed re-written scope language!*
- **Thursday:** Client’s Project Team provided answers & documents
- **Friday:** Released the final RFx with expert-augmented Scope
  
- **NOTE:** done in parallel with RFx development = No lost time!

# This takes Training & Outreach to the Supplier Community



**“We’ve got it covered?”**



**Don't release and “hope for the best”**

# When in Doubt...Issue an RFN!!!

**Leverage expertise from the industry to check:**

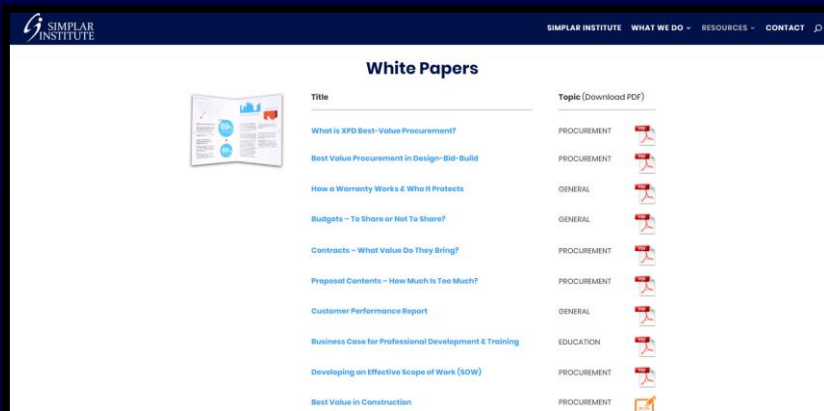
- **Is our approach feasible?**
- **What are realistic options?**
- **What information do suppliers need to prepare an accurate proposal with minimal contingency?**

**The Client DOES NOT need to know every detail!**

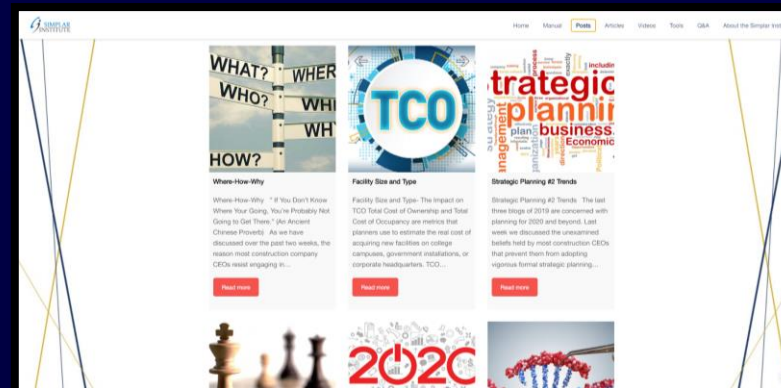
- 1. Define current conditions**
- 2. Define objectives / requirements / Scope**
- 3. Leverage industry feedback**

# www.simplar.com

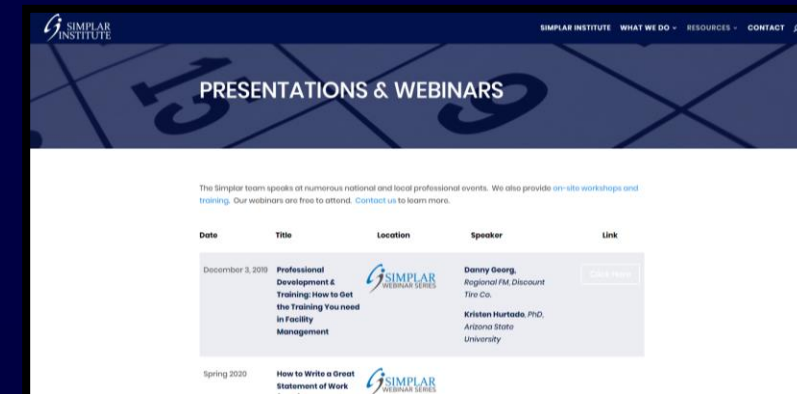
- On-site / Hands-On Training
- Project / Organizational Support of RFP & Project Delivery



## Website / Papers



## Blog



## Webinar Series

# Key Takeaways

1. **Five main components to an effective scope of work**
  - Summary
  - Current Conditions
  - Detailed Requirements
  - Schedule
  - Budget
  - Unique Considerations
2. **Focus on expertise & solutions**

[jeff@simplar.com](mailto:jeff@simplar.com)