

# AIIM Membership Tools

*Delivering the priorities and opinions of AIIM's 65,000 community*



Membership Tools  
**Request for Proposal**

## Enterprise Content Management (ECM) *Request for Proposals Template*

*This template was developed for AIIM by:*

*AIIM Professional Members Mark Mandel and  
Bud Porter-Roth and reviewed by the AIIM  
Standards Board.*



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## AIIM ECM/EDM Request for Proposal (RFP) Template

This RFP template is based on ANSI/AIIM TR27, *Enterprise Content Management Request for Proposal (RFP) Guidelines* developed by AIIM Standards Committee, C27 and *Request for Proposal: A Guide to Effective RFP Development* by Bud Porter-Roth. This template was developed by AIIM Professional Members Mark Mandel and Bud Porter-Roth for AIIM. The template's versatile design allows you to copy appropriate sections into your own RFP.

Note: This template is a starting point to help organizations determine their requirements for an ECM/EDM System. It is critical to the success of your project that you accurately and in a very detailed manner document your requirements exactly as you need them. Organizations should consider using the services of a consultant to help in this process.

To access the tool which consists 3 parts, please download the items via the provided URLs:

- Editable version of the RFP Template
  - RTF Format – <http://www.aiim.org/documents/standards/tools/RFP-Template.rtf>
  - DOC Format – <http://www.aiim.org/documents/standards/tools/RFP-Template.doc>
- Cost Proposal Response Template – [http://www.aiim.org/documents/standards/tools/Cost\\_Proposal\\_Response\\_Template.xls](http://www.aiim.org/documents/standards/tools/Cost_Proposal_Response_Template.xls)
- RFP Evaluation Template – [http://www.aiim.org/documents/standards/tools/RFP\\_Evaluation\\_Template.xls](http://www.aiim.org/documents/standards/tools/RFP_Evaluation_Template.xls)

Download all pieces as a zip file – [http://www.aiim.org/documents/standards/tools/RFP\\_Template.zip](http://www.aiim.org/documents/standards/tools/RFP_Template.zip)

To use this template and associated evaluation and cost spreadsheets,

- Delete the cover and foreword of this template.
- Modify the Table of Contents prior to submitting the RFP to a potential solution provider.
- Enter your organization information in the spaces provided (identified by < >).
- Understand your organization's specific needs and the goals of soliciting proposals for new technology.
- Describe your organization's current situation.
- Enter your functional, technical, service/implementation requirements either in the form of a question or a statement. Make sure your requirements are specific so that you will get the information you need to evaluate the response.
- Determine your evaluation and weighting factors and enter them in the evaluation spreadsheet along with the requirements you include in your RFP.

This template will provide you with the main items to be included in the RFP. However, it should be noted that there may be some elements that you choose not to include or that you want to include that are not identified in this template.

Note: Throughout this RFP template, we have used carets < > to denote where you should include information about your organization. We also used the carets to point out notes or instructions for you in drafting your RFP. These notes should be deleted prior to submitting your RFP.

For additional information on the ECM/EDM technologies, please consult AIIM/ARP-1:2009, Recommended Practice – Analysis, Selection and Implementation of Electronic Document Management System (EDMS) which you may download for free at: <http://www.aiim.org/AIIM-ARP1-2009-Recommended-Practice-EDMS.aspx> .

**Problems to Avoid with your RFP**

1. Number of users is not defined
2. Pricing format is unclear
3. Objectives and scope are not clear
4. Insufficient budget for specified scope
5. Fixed price required for undefined complex application
6. RFP specifies technical solution, not functional requirements
7. Number of documents, pages and images unclear
8. Liquidated damages for schedule slip
9. Response format not defined
10. Evaluation criteria is skewed or not defined