

DB01: Developing, Influencing and Responding to Request for Proposal's (RFP's)



Robert D. Grossman

President

R. Grossman and Associates, Inc.

Learning Objectives

- Hear how the RFP process can be used to ensure the desired outcome
- Discover what end-users look at when evaluating RFP's
- Learn how to respond favorably and effectively to RFP's



Bio – Bob Grossman

President, R. Grossman and Associates, Inc.

Electronic security consulting practice

- Frame of Reference:
 - Focus on hands on
 - Industry experience
 - Police, Legal, Locksmith, Integrator
 - Larger projects

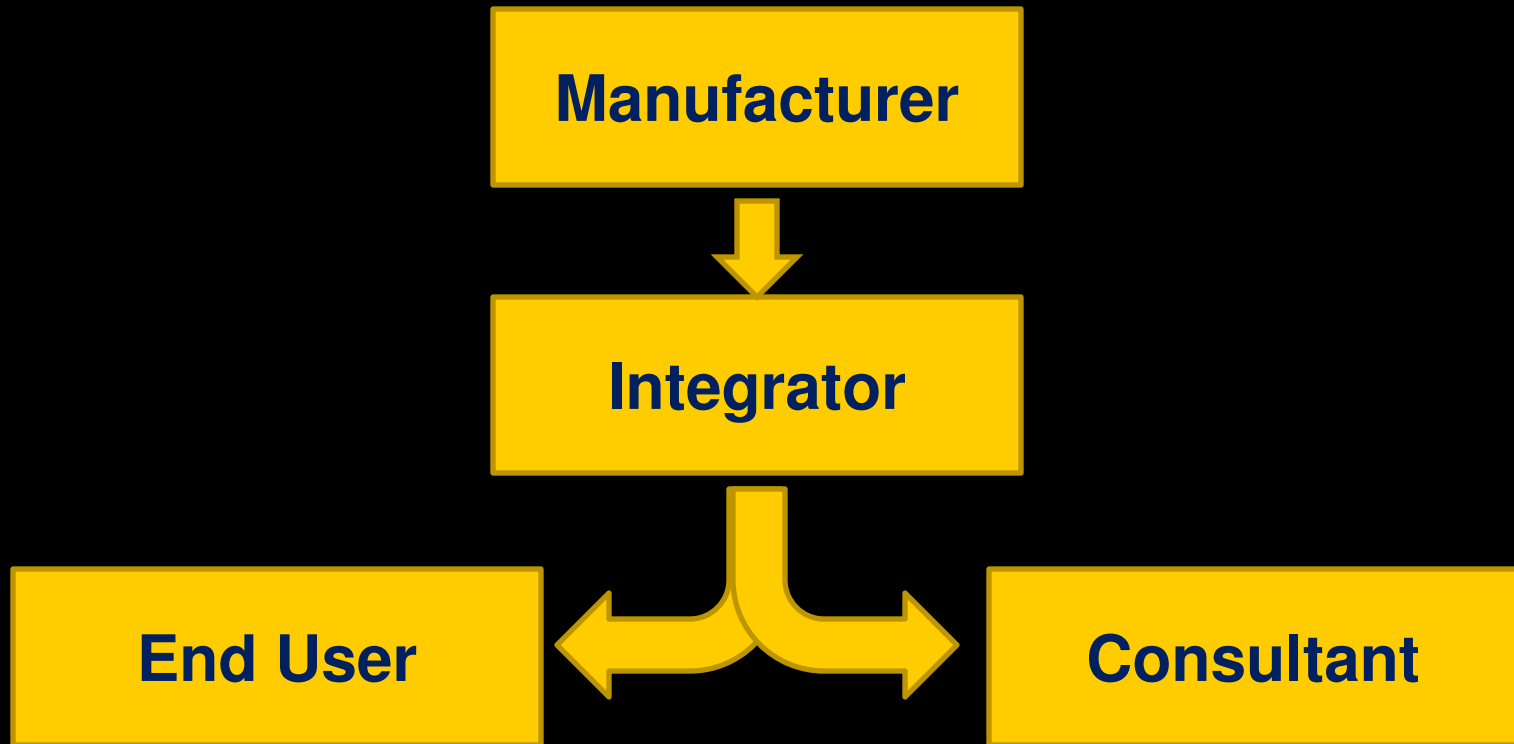


Bio – Bob Grossman

- Consultant
 - President, R. Grossman and Associates, Inc.
- Integrator
 - Senior Project Manager, Sensormatic
- Manufacturer
 - VP, Customer/Technical Services, Vicon
 - Director, Product Line Management, AD (Tyco)
- End User
 - Manager, Communications & Electronics, Bally's



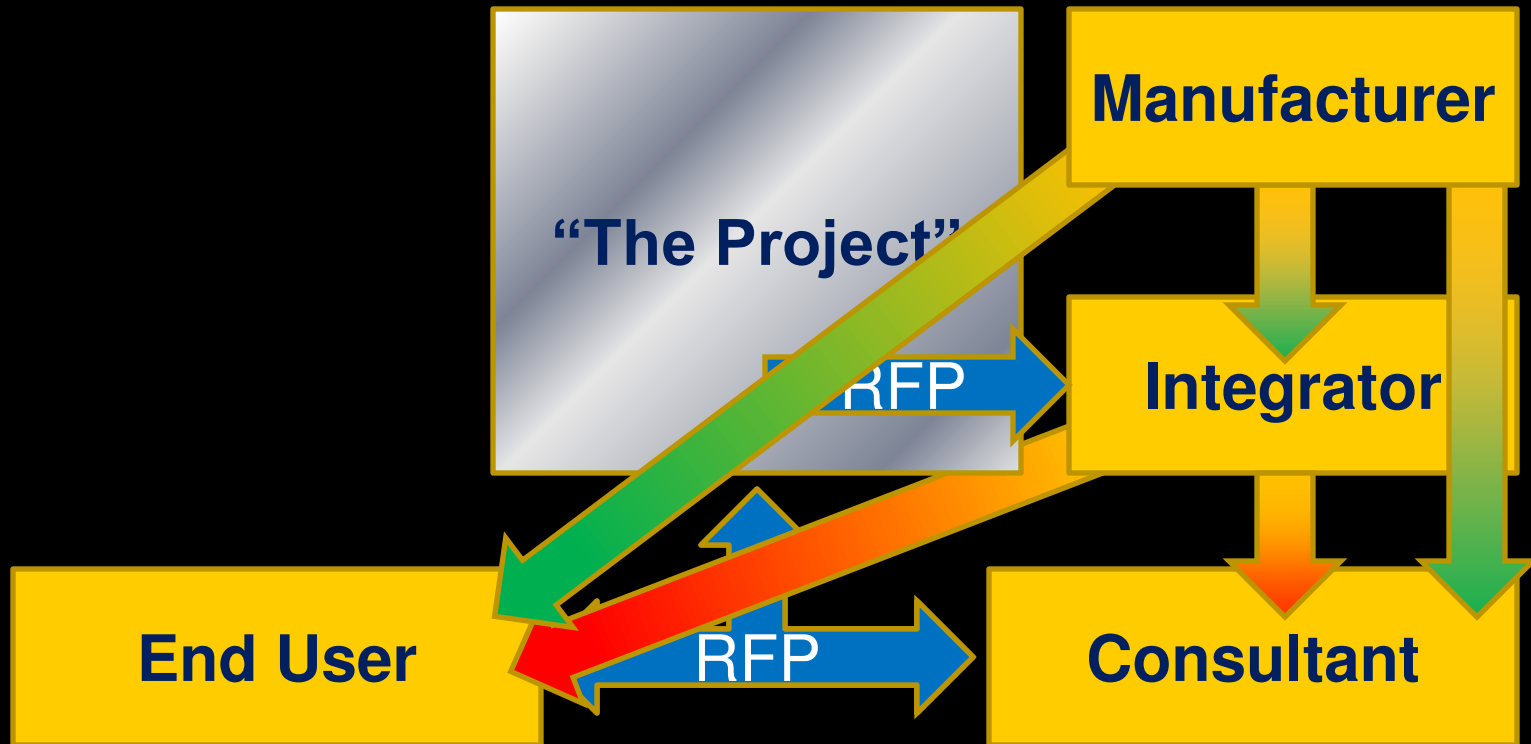
Supply Chain Influencers



It's All About The Project



The Project



The RFP



- Define the end result
 - Functional (what it does)
 - Directed (specific equipment used)
 - Can be combination
 - Housekeeping (fit and finish)
 - Competence of Integrator
 - Training and Ongoing Support (manufacturer and integrator)



Goals for today...

Integrators responding to RFP's aren't clear on exactly how they should showcase their strengths while providing the proper information to prevent their firms from being rejected.

Manufacturers often seek to influence the RFP process to ensure their products are included, or at least not excluded.



Goals for today...

Provide salient points for the end user in developing and issuing RFP's and supervising the bidding and request for information process.

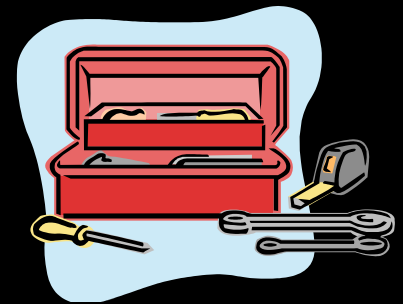
Guide integrators (and end users) in how RFP's are commonly evaluated and equalized to allow for fair and open competition and letting the best firm win.

Review what consultants look for to include manufacturers in their specifications.



To Do This:

- Review RG&A RFP Sections
 - What we include
 - How to respond
 - How to influence
- Outline Format versus CSI format



The RFP Binder

1. Front End (where applicable)
2. Specification
3. Timeline
4. Schedules
5. CAD Drawings
6. Supporting Material



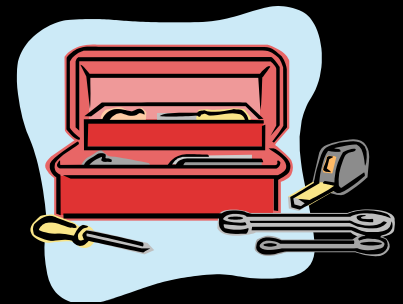
Front End *

- Provided by end user (boilerplate)
- All items may not apply
- All must be addressed
- Compliance is critical

INTEGRATOR:

- Single most important part of RFP

* where applicable



Specification *

- Multiple sections (review follows)
- References other supporting documents
 - CAD drawings
 - Schedules
 - Project Time Lines
 - Supplemental material
- Specification and Front End require a response

* always applicable



Table of Contents

- Not all RFP's include this
- Great for cross reference
 - Used more by Consultant than respondent
- Includes key items in spec
- Shows what items are viewed as “key”



Introduction

- Definitions
 - Roles, responsibilities, terminology
- Overview of project
 - Description
 - Location
 - 40,000' view



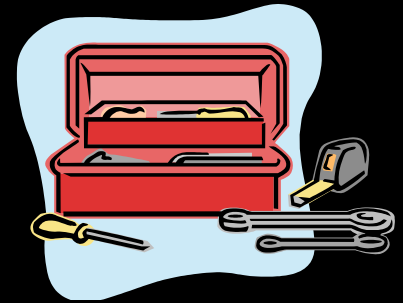
Instructions for Prospective Bidders

- Defines RFP Package
 - What is included
- Housekeeping
 - Walkthrough, due date, response format
- Option packages
- RFI procedures
- Evaluation criteria



Option Packages

- Base System
- Options to be priced separately
 - Some might deduct from the base
- Budgeting tool
- Order can be important

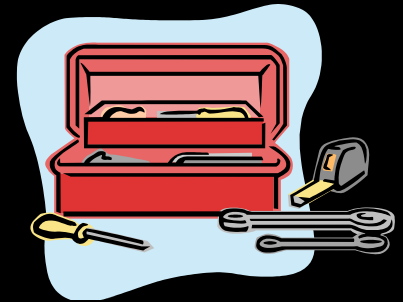


INTEGRATOR:

- If pricing is in an option, it should not be in the base (console)
- Be careful of value add (may put at a price disadvantage)

RFI Procedures

- Registration requirements
- Project e-mail address
 - USPS@tech-answers.com
 - All RFI's sent via e-mail
 - Client on distribution list
 - Responses to all registered bidders
 - Summary at end of RFI period
- No direct communication with the client



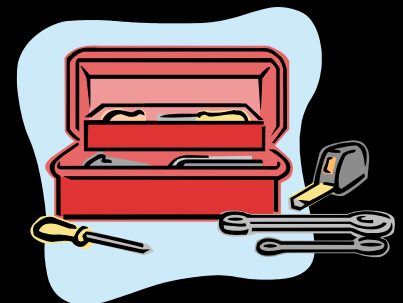
RFI Procedures

INTEGRATOR:

- Follow directions
- Attendance at pre-bid meeting does not guarantee project registration
- Register multiple people
- Everybody reads your _____ questions
- Don't fear asking for an extension

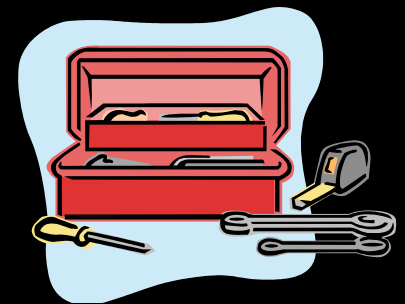
MANUFACTURER:

- Benefit from registration
- Learn from questions, responses



Evaluation Criteria Examples

- Past performance (including references)
- Time in business
- Technical experience
 - Includes personnel and training
- Ability to perform work in time frame allotted
- Overall project price



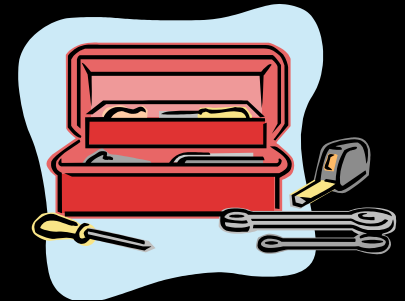
Evaluation Criteria Examples

INTEGRATOR:

- Spelling counts
- Assume references will be checked
 - Accurate, up to date
- Make sure response is complete
 - Compliance statement, pricing sheet, wrong day/time
- Why is pricing always last?

MANUFACTURER:

- Integrators are a reflection of manufacturer



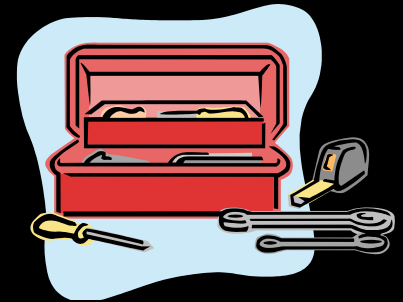
Scope of Work

- Project overview, services required
- Training
 - Deferred session(s)
- Documentation
 - Hard and soft copy
- Warranty
 - Depot vs. on site
- System Acceptance



Scope of Work Expectations

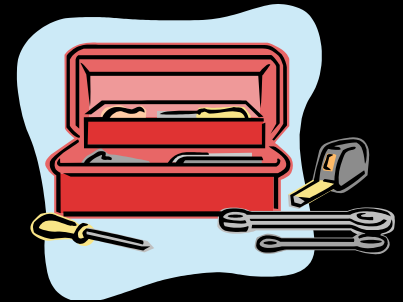
- The system
- The support
- The relationship
 - Software upgrades and support
 - Dispute Resolution
 - “Referenceability”



Scope of Work Expectations

INTEGRATOR:

- Goal is to create a reference
 - Quality of Service (QOS)
- Connection between office and field
 - Office writes check that field can't cash
 - Sloppy response may not mean sloppy work
 - Neat response doesn't mean neat work either



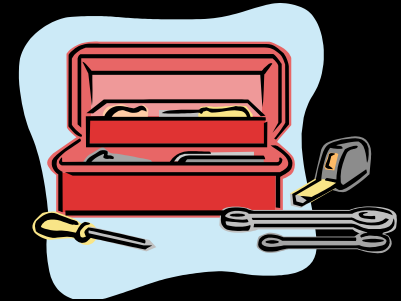
MANUFACTURER:

- RFP should reflect exceptional services that you can offer
 - Raise the bar



System Acceptance

- Signal quality
- Installation quality
- System functionality
- System performance
- System capacity
- Complete system
- Video retention testing



Video Retention Testing

Example of spec providing just enough detail...

- Storage requirements for digital video
 - Frame Rate
 - Compression Quality
 - 5% digital artifacts
 - Recording Duration



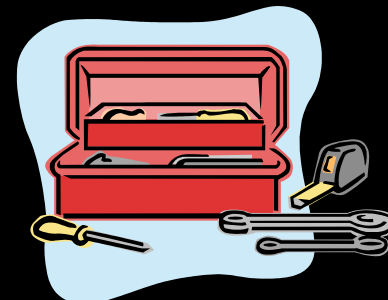
System Acceptance

INTEGRATOR:

- Follow directions
 - Motion recording when 24/7 specified

MANUFACTURER:

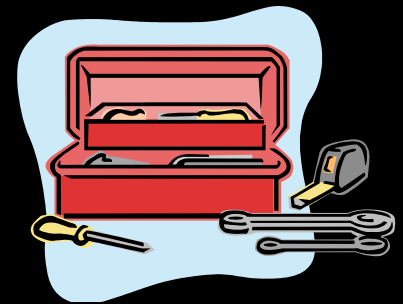
- Ownership of video retention
 - Level playing field for integrators
- Verify features are actually available
- Is your warranty/support program consistent with RFP?



General

- Manufacturers experience
- Software licensing
- Cable and connectors
 - Infrastructure is critical
- Fit and finish
 - Professionalism
 - Sharpie versus printed labels
- Positioning of equipment

ARE
SPECIFICATION
SECTIONS TOO
GRANULAR?



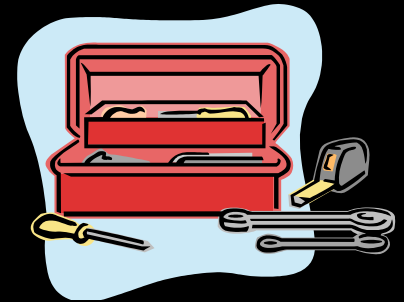
General

INTEGRATOR:

- Follow directions
- Fit and finish far cheaper to get right the first time

MANUFACTURER:

- Emphasize experience required for your technology
- Licensing and recurring fees a key differentiator
- Financial stability



Electrical
Tape

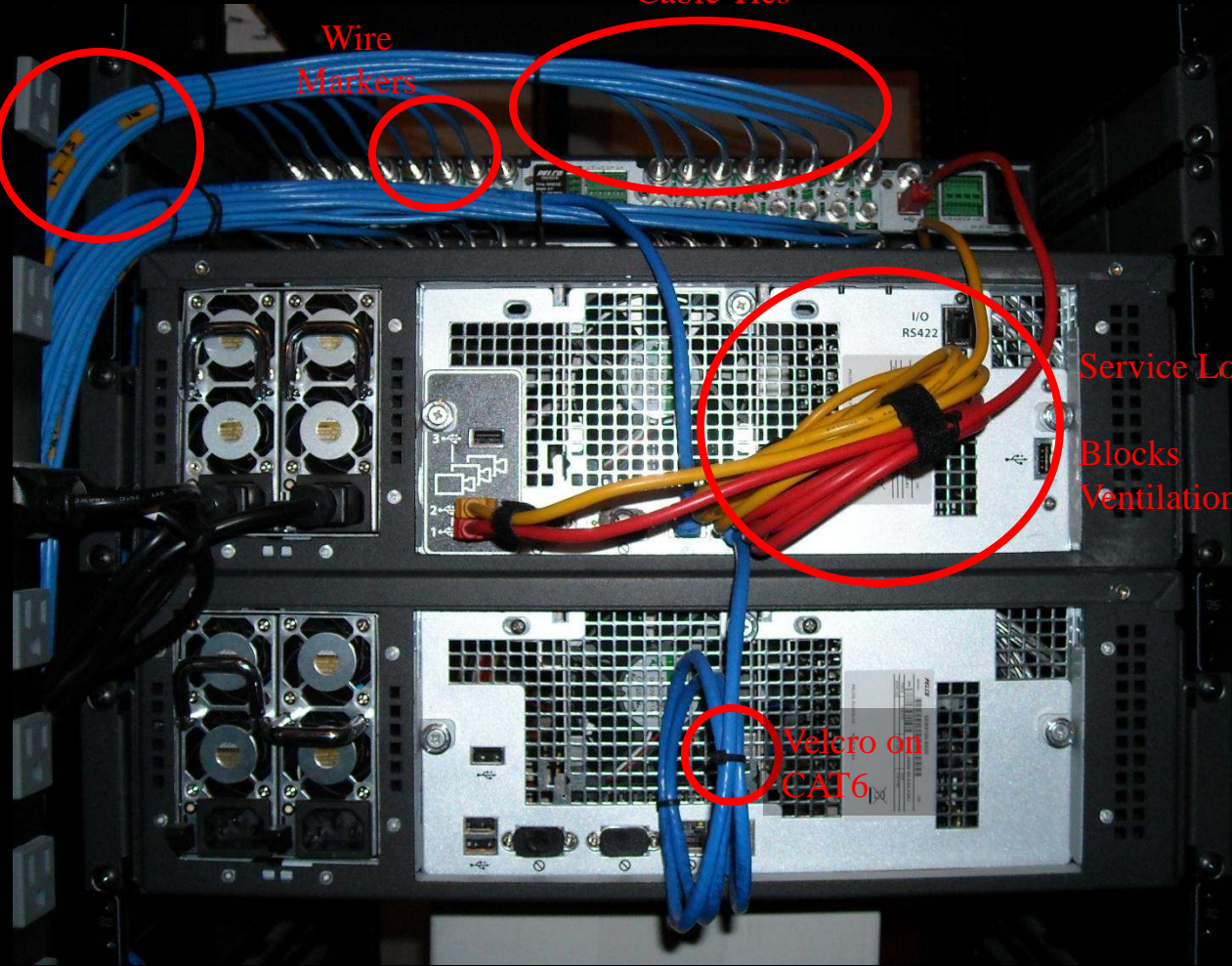
Wire
Markers

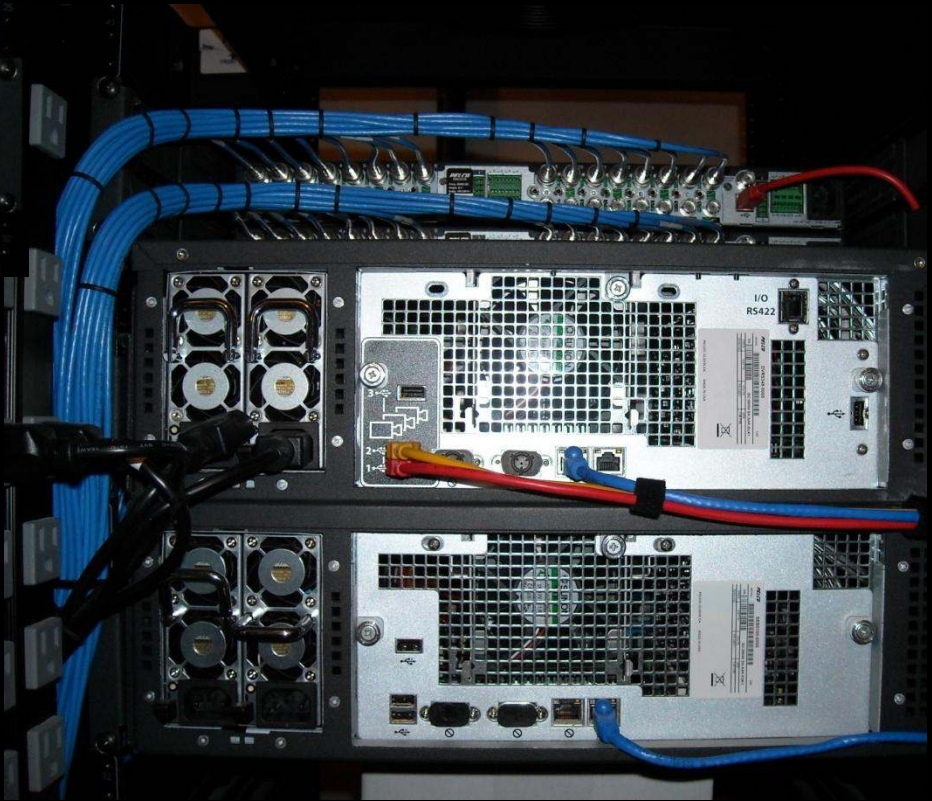
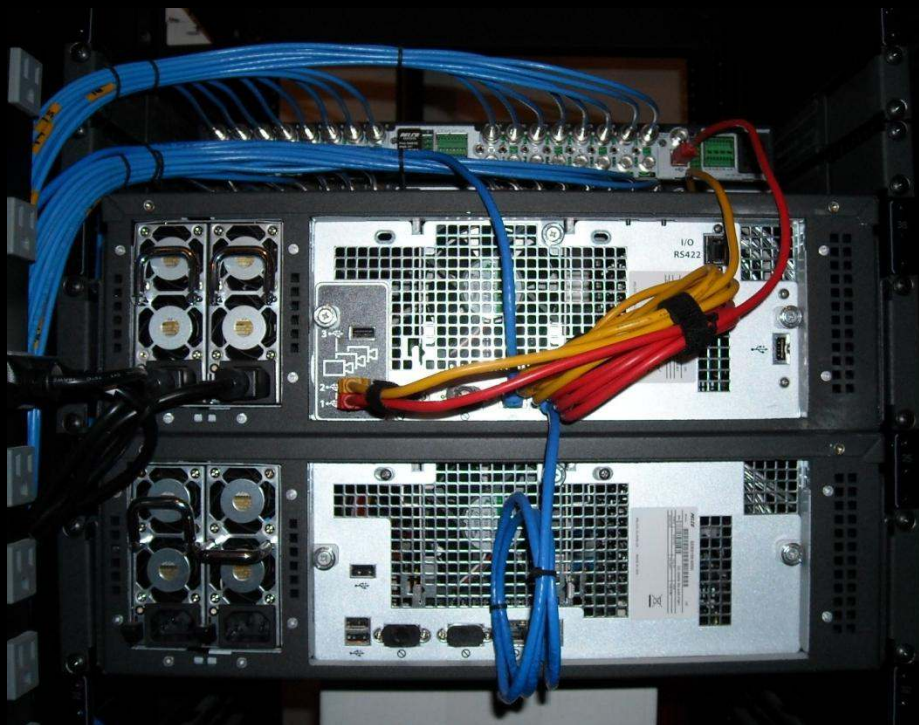
Cable Ties

Service Loop

Blocks
Ventilation

Velcro on
CAT6





Equipment Sections



- Specify sub-systems
 - Field devices
 - Monitoring
 - Headend
 - CCTV, access control, alarm point monitoring, radio, command center
- Should reflect “real world” equipment

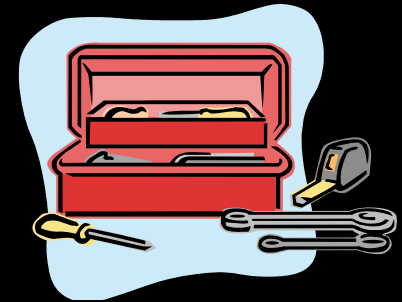
Equipment Sections

INTEGRATOR:

- Don't be afraid to substitute
 - Make sure it is a true equal
- Don't go around the consultant

MANUFACTURER:

- Best you can expect: not excluded
- Your hope: “Or approved equal”
- Your dream: “No substitutions”
 - Lazy consultant inadvertently hard specs manufacturer
 - Good consultant can hard spec as desired (802.11N)



System Reliability

- Data redundancy
- Lightning and surge protection
- UPS system
- Spares package
- Failure notification



Terms and Conditions

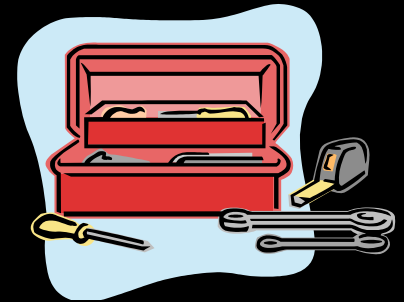
- “_____ is in the details”

INSERT NAME OF RESPONSIBLE PARTY HERE

- Permits, fees, licenses
- Bonding
- Extended payment schedule
- Insurance
- Consumables

INTEGRATOR:

- Pay attention



Excluded Work

- HVAC
- Power
- Roof penetrations
- Asbestos abatement



RFP Binder

- Supplemental sheets support specification
 - Timeline
 - CAD Drawings
 - Schedules
 - Supporting Material

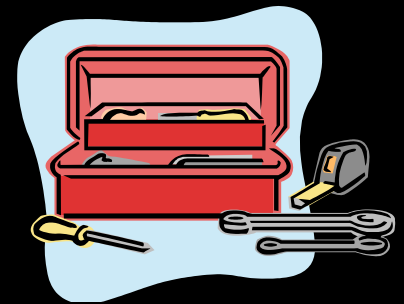


CAD Drawings

- Device locations
- Room layouts
- Flow charts
- Design details
 - Point-to-point, typical, layout
- Rack elevations

INTEGRATOR:

- Pay attention

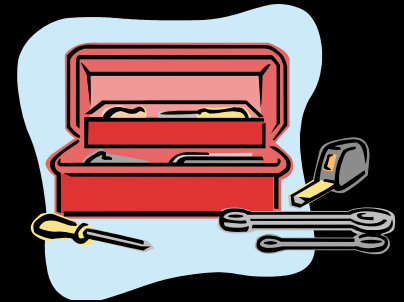


Schedules

- Device detail
- Wiring
- Doors
- Power/HVAC (estimated)
- Control locations

INTEGRATOR:

- Pay attention (really!)

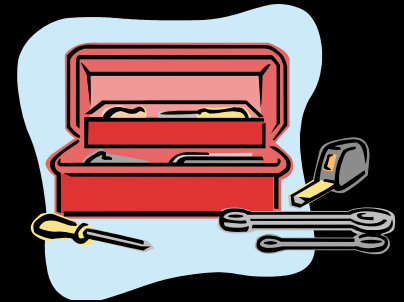


Supporting Materials

- Equipment Lists
 - Provided by manufacturers
 - Level playing field, reduce mistakes
- Contact Information
 - Specified suppliers
 - Competing bidders

INTEGRATOR:

- Pay attention (this stuff is here for a reason!)



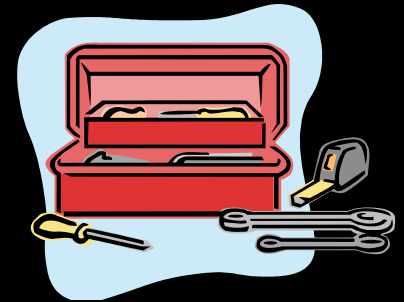
Integrator/Manufacturer

INTEGRATOR:

- Follow directions
- Pay attention
- Spelling counts

MANUFACTURER:

- Mindshare = market share
- Support your integrators and consultant



Resources:

- RG&A Security Info Center
 - Articles on security topics
 - This presentation will be posted next week
 - <http://www.tech-answers.com/security-info-center/>
- Enterprising Solutions Blog
 - <http://www.securitysales.com/Blog/Enterprising-Solutions.aspx>
- Bob Grossman
 - www.tech-answers.com
 - rdgrossman@tech-answers.com
 - (609) 383-3456



Evaluation:

If you liked this class...

- Bob Grossman
rdgrossman@tech-answers.com
(609) 383-3456
Business cards at front of room

If you didn't like this class...

- Charlie Sheen
My Violent Torpedo of Truth Tour
Evolution Entertainment, Inc.
901 N. Highland Avenue
Los Angeles, CA 90038



Thank You!

