**Sample RFP for a Strategic Portfolio Management Solution**

2023

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Background Material

This section is for gathering information about your organization and the industry so that the vendor responding can put its response in the context of this information. It will also reduce the number of questions about the company from vendors.

Instructions to Vendors

Vendor proposals in response to this RFP will be accepted by [XYZ Corporation, insert contact person’s details] at 5:00 p.m. [ET] on [date]. Submittals must be made electronically in Microsoft Office format.

Schedule of Events

* RFP released to vendors [date]
* RFP Q&A period begins [date]
* RFP Q&A period ends [date]
* RFP responses due [date]
* RFP evaluation begins [date]
* Reference checks begin [date]
* Reference checks end [date]
* Proof of concept begins [date]
* Proof of concept ends [date]
* RFP evaluation ends [date]
* Final award to vendor [date]

Cover Letter

The proposal must be accompanied by a cover letter, signed by an individual authorized to bind the proposed entity.

Financial Information

The vendor shall provide a complete set of audited financial statements for the past three years. All financial statements should be prepared according to generally accepted accounting principles. Each vendor should note that XYZ Corporation reserves the right to purchase credit reports and additional financial information as it deems necessary. The vendor shall also provide a copy of its corporate annual report. In the case where the vendor is not a public company, the vendor must provide financial statements that can be used during the evaluation to determine the financial viability of the vendor.

Proposal Evaluation

The evaluation process will consist of:

* A preliminary examination to determine substantial commercial and technical responsiveness
* A detailed technical evaluation to determine conformity to general and functional requirements
* A demonstration of proof of concept

[Review and modify to describe your organization’s evaluation process.]

After completing the evaluation phase of the process, XYZ Corporation will enter into financial negotiations with no more than [two] vendors. The final selection will be based on the satisfactory outcome of these negotiations.

References

The vendor should provide details on two to three customers for reference. References should be for customers with requirements similar to those of XYZ Corporation. References should include information about the contract (i.e., specific products in use, date of contract execution, “go live” date and any services provided) and contact information for the client’s project manager or other senior staff members familiar with the project.

XYZ Corporation reserves the right to contact these references and discuss the client’s level of satisfaction with the vendor and its products. It is up to the vendor to contact the references and get permission to use them as references, as well as to identify the name and contact information for the person who can be used as a reference.

Implementation and Deployment

Based on XYZ Corporation’s objectives, timeline and environment, vendors should provide a recommended approach for implementation and deployment. This should include the use of system integrators, or other third parties, and provision of vendor post implementation support services (in addition to training).

Skill Set Requirements of Personnel

Vendors should describe the skills needed to implement and support their application product(s), as outlined in this proposal.

General Comments

Vendors should include any additional information they feel would help XYZ Corporation evaluate their submission.

Treatment of Information

All information about XYZ Corporation provided during the RFP process shall remain under nondisclosure and cannot be released without the express permission of XYZ Corporation.

Note: Separate nondisclosure documents can be included with the RFP.

Solution Overview

This section is for gathering overview information about your proposed solution, i.e. history of your product; integration with third-party systems; sample customer implementation details, etc. Providing detailed data will help to pre-empt questions you might have about the vendor.

1. What is the current version of the solution? How long has the current version been on the market?
2. How often is the software updated?
3. What is the frequency for major and minor upgrades?
4. What is the typical amount of effort for a customer to upgrade from a version of the solution to the next major release? Outline the required upgrade process.
5. Identify any third party software packages that are included with the solution, either through an OEM relationship, or an extension of standard functionality.
6. Does the solution offer pre-packaged business metrics, process automation, management portlets, and other reports and templates based upon best practices and standards, such as the Project Management Body of Knowledge (PMBOK)?
7. How many users is your smallest customer?
8. How many users is your largest customer?
9. How large is the largest projects of any of your customers that is managed in your software?
10. How many projects (per year or at any one time) does your largest customer manage in your software?
11. What are the shortest and longest project durations managed in your software by any of your customers?

Functional Requirements (General)

This section is designed to gather general data about the functional requirements of your proposed solution, e.g. regarding configuration, upgrades, customer service, software localization, and so on.

1. Is the solution a single, fully integrated application with role-based access, or is it comprised of multiple, separate modules?
2. How many databases are used to provide the functionality proposed within this proposal response?
3. Describe the degree to which the solution can be configured to meet client-specific business requirements.
4. How large a role do customizations play when deploying the solution to meet client needs?
5. What percentage of your customers have customizations?
6. Can configuration settings vary between organizations within a single deployment?
7. Are all configuration changes supported during the upgrade process?
8. Are both online help and user manuals available?
9. Describe current support for multiple languages?
10. Can multiple languages be used within a single deployment?
11. Does the solution support international date and currency formats?
12. Does the solution provide support for multiple currencies?
13. How are exchange rates maintained?
14. Can an automatic update of exchange rates from the Internet be received by the solution?
15. Is all functionality for the solution available through a thin client, browser-based interface? Identify the functional capabilities that require software to be installed on the user’s desktop, including any Java Applets and Active X controls.
16. Can the layout of the user interface, including icons and action menus, be modified without customization?

Contract Management

This section is for gathering overview information about bid details, e.g. billing information, support costs, foreign currencies, high-level resource capacities, contact management processes, contract minutiae etc.

1. Can the solution capture specific billing information by contract?
2. Can multiple contracts be established for a single customer?
3. Can a contract with terms be managed by the system?
4. Can specific billing information be captured for a contract?
5. Can the same resource be billed at multiple rates on a specific contract depending upon the type of work that is being performed?
6. Describe how Rate Cards are held in the system?
7. Does the system support burdened costs as well as rate cards?
8. Can resources be billed in different currencies?
9. Does the solution allow for fixed fee billing?
10. Can a contract be established that includes both time and materials billing and fixed fees?
11. Does the solution support sales that include both products and services?
12. Is a product list and/or Bill of Materials supported in the solution?
13. Can templates be established for contracts and used to simplify the creation of new contracts?
14. Describe how the system may be used during the process of contract disputes?

Contact Management

1. Can contact records be maintained within the solution, including contact information?
2. Can additional client information stored within electronic documents be directly attached to client or contact records?
3. Does the solution allow a client to share files and information with the project team (please explain how)?
4. Does the solution allow a client to review project and task status electronically?
5. Does the solution allow a client to create new work requests, change requests or support requests electronically?
6. Does the solution provide the ability to limit access to specific records based upon geography, roles, and responsibilities?

Opportunity Management

1. Does the system support CRM integration?
2. Does the system support the creation of Bids?
3. Does the system support the creation of Estimates?
4. Does the system support the inclusion of Products in Bids and Estimates?
5. Can proposals and supporting information be stored?
6. Can activities be tracked against opportunities?
7. Can probability percentages be associated with the stage and/or opportunity?
8. Does the system support workflow capabilities for review and assessment of bids?
9. Can Visio diagrams be imported to the system and displayed to show our business processes?
10. Can Visio Diagram elements be linked to steps the user is following in the system?
11. Describe the forecasting capabilities for an opportunity?
12. Describe how resource requirements from opportunities can be evaluated against current resource capacity?

Project Management

This section is for collecting specific details about the make-up of the SPM solution, i.e. task management, integration to key third-party systems such as Primavera P6 and Microsoft Project, Gantt charts, work breakdown structure (WBS). It also enables you to drill into critical solution areas like methodologies, earned value management and project templates.

1. Does the solution provide detailed multi-level project planning?
2. Are task names defined by the Project Manager or pre-defined within the solution?
3. Does the solution manage project dependencies (Inter-task dependencies, Inter-project dependencies)? If so, can the solution handle the linking of tasks between multiple projects? If so, are many to many relationships supported?
4. Can tasks be time bound with a specific start and end time of a task, such as 11am to 3pm?
5. Are negative lag times supported?
6. Is slack supported?
7. Is Critical Path supported?
8. Can project templates be created within the solution?
9. Can a Project Manager quickly create a new project plan based upon a template?
10. Can project planning be integrated with Microsoft Project?
11. Is integration with Microsoft Project a one-time only event, or can a project maintain the integration throughout its lifecycle?
12. Describe the process by which a project is integrated to Microsoft Project?
13. Can project planning be integrated with Primavera?
14. Is integration with Primavera a one-time only event, or can a project maintain the integration throughout its lifecycle?
15. Describe the process by which a project is integrated to Primavera P6?
16. Can projects be planned and managed in a single, grid style interface similar to MSP or Excel?
17. Can Gantt charts be rolled up from Projects to Programs?
18. Can Gantt charts be rolled up from Projects to Portfolios?
19. Are Program Level tasks supported?
20. Can projects be planned by phases?
21. Can project budgets be released by Phases?
22. Can sub-projects be created within a project plan, and managed by additional Project Managers?
23. Can summary tasks be delegated to other Project Managers?
24. Can project management rights be distributed amongst users at different levels of the Work Breakdown Structure (WBS)?
25. Is there a limit to the number of project baselines that can be stored and reported upon per project?
26. Can resources from multiple departments and organizations be assigned to a single project?
27. Can multiple resources be assigned to a single task, each with a different number of planned hours?
28. Does the solution allow a Project Manager to search for and assign a resource directly from a task?
29. Does the solution provide Resource Leveling capabilities?
30. How is a Project Manager notified when a resource is over-booked?
31. How is a Project Manager notified when a resource exceeds or forecasts that they will exceed the planned number of hours for a task?
32. Can resources provide task status updates to a Project Manager?
33. Can status updates be used to determine project performance and update the project plan?
34. Can all relevant documents pertaining to a project or task, such as Sponsor Requirements, Detailed Requirements, Project Plan and Project Charter be attached to a project(s), and/or to an individual task(s)?
35. How are project budgets established within the solution?
36. Describe the budget functionality provided within the solution.
37. Does the solution provide visibility into charge and cost rates when assigning resources to tasks on projects?
38. Can charge and cost rates be assigned/restricted via security at the user level?
39. Are performance reports available in the solution that compares Budget to Actual?
40. Can multiple revisions of a project budget be maintained within the solution?
41. Describe how the solution summarizes and reports all relevant project information to senior management, the Project Management Office, and other cross-functional users.
42. What reports are available to measure variances for the project in the areas of schedule, cost, hours and scope?
43. Does the solution support the development of custom workflow for project review cycles?
44. Can workflow vary by project attributes?
45. Is the workflow history for projects automatically tracked and available?
46. Does the solution provide the ability to incorporate business rules into the workflow configuration?
47. What are the different types of steps or activities that can be built into a project workflow?

Agile

1. Describe your products ability to support an Agile project approach.
2. Does your solution include the ability to track product backlog, including information and features that support Scrum.
3. Explain how your product supports Sprint backlog creation and management.
4. Does your solution include burn down charts?
5. Is there the ability to drill-down from the high-level views to the project detail for a sprint detail?
6. Explain how you support sprint planning, providing a means for transitioning from the Product Backlog to Sprint Backlogs.
7. Do you support a release planning function by product?

Product Management and Product Development Projects

1. Does the system have the capability to manage and track new product development projects from concept to launch?
2. What features does the system offer for managing and tracking the product development process, including stage gate approvals and project milestones?
3. Can the system support different product development methodologies, such as Agile, Waterfall, Lean, etc.?
4. How does the system handle the management and tracking of project budgets, costs, and expenses for new product development?
5. How does the system support the management and tracking of product specifications, design, and testing during the development process?
6. Can the system integrate with other product development tools and systems used by the customer?
7. What level of support and training is included with the system for new product development project management?
8. Can the vendor provide references from customers who have successfully implemented and used the system for managing their new product development projects?
9. What is the pricing model for the system, and are there any additional costs or fees for new product development project management?
10. Can the system provide real-time data and performance metrics for new product development projects?
11. How does the system handle the reporting and analysis of product development data and performance metrics?
12. How does the system handle the management and tracking of project-related changes to product specifications, design, and testing during the development process?

Earned Value Management

1. Does the solution provide Earned value analysis and flexible earned value reporting?
2. Does the solution support the Earned value analysis concept of ACWP Actual Cost of Work Performed?
3. Does the solution support the Earned value analysis concept of BAC Budget At Completion?
4. Does the solution support the Earned value analysis concept of BCWP Budgeted Cost of Work Performed?
5. Does the solution support the Federal Earned value analysis concept of Control Accounts?
6. Does the solution support the Federal Earned value analysis concept of CLIN’s
7. Does the solution support the Earned value analysis concept of EAC Estimate At Completion?
8. Does the solution support the Earned value analysis rules of DCMA?
9. Does the solution support NCC Negotiated Contract Cost?
10. Does the solution support the Federal Earned value analysis concept of SLPP Summary Level Planning Package?
11. Does the solution support the Earned value analysis concept of TAB Total Allocated Budget?
12. Does the solution support the Earned value analysis concept of UB Undistributed Budget?
13. Does the solution support the Earned value analysis concept of WP Work Package?
14. Can EVM reports (such as those for US Federal Contracts0 be automatically created by the system?

Methodologies, Stage Gates, and Process Configuration

1. Does the system support multiple stage gate methodologies and project methodologies?
2. Can methodologies be linked to a project in a way that shows where a project is in its lifecycle?
3. Can a project have more than a single methodology applied to it?
4. Can methodologies be Role Based (depending on a persons role on the project)?
5. Can the system be customized to support different business processes for different business divisions within an organization?
6. How does the system handle the different project types, such as Agile, Waterfall, Lean, etc.?
7. What features does the system offer for project planning and scheduling, resource allocation, and task management that support different project methodologies?
8. How does the system support the tracking and management of project milestones and approvals for different stage gate methodologies?
9. Can the system integrate with other tools and systems used by the customer, such as financial management software or project management software, for each business division?
10. What level of support and training is included with the system for customizing and implementing different methodologies and business processes for different business divisions?
11. Can the system provide real-time project data and performance metrics for each business division, and can it be customized to display the data that is relevant to each division?
12. How does the system handle the reporting and analysis of project data and performance metrics for different business divisions, and can it be customized to meet the reporting needs of each division?
13. What is the pricing model for the system, and are there any additional costs or fees for supporting multiple methodologies and business processes for different business divisions?
14. Can the vendor provide references from customers who have successfully implemented and used the system for supporting different stage gate methodologies, project methodologies, and business processes for different business divisions?

Project Templates

1. Does the system have the capability to create project templates?
2. Can templates be created from existing projects?
3. How flexible is the template creation process, can they be customized to meet specific project requirements?
4. Can the templates be easily updated or modified as required?
5. Can templates include all relevant project artifacts such as project plans, risk management plans, communication plans, etc.?
6. Can different templates be created for different types of projects or departments?
7. How does the system support the use of templates in new projects?
8. Can project templates be easily reused across different projects?
9. Does the system support collaboration and approval processes for template updates?
10. How does the system ensure the consistency of project artifacts across all projects using the same template?
11. Can templates be stored and managed centrally for easy access and use?

Resource Management

This section will help you to collate data on resource planning and capacity management, e.g. skills handled, project calendar, threshold warnings, time reporting, invoicing etc.

1. Outline the scope of information that is maintained within the solution for each resource, such as contact information, cost rates, vacation hours, utilization targets, user’s base currency, reports to, etc.
2. How are skills managed within the solution?
3. Can the skills list be adapted to client-specific skill sets?
4. Can resources update their own skill list?
5. Can a resource’s skills list be centrally controlled?
6. What capability does the solution offer to maintain contractor profiles and to manage contractor work?
7. Describe how organizational structures are managed within the solution?
8. How are resources associated with appropriate divisions, departments and teams?
9. Can the solution manage the movement of resources from one division or department to another?
10. Is there a limit to the number of levels of organizational hierarchy that can be established within the solution?
11. Does the solution support soft bookings and hard bookings?
12. Can resource assignments be maintained on a calendar for an individual or department?
13. Can assigned tasks be displayed upon a resource’s calendar?
14. For tasks that have a specific start and end time, are they displayed at that time in the resources Outlook calendar?
15. Does the solution support a Project calendar?
16. Does the solution provide a view of a resources calendar which can display all of the assigned tasks that resource is scheduled/allocated to work on in that day?
17. Does the solution provide a view of a resources calendar which can display all of the soft booked tasks that resource is reserved on to work in that day?
18. Can project or resource managers staff projects with resources, understanding the resource’s other project, administrative, and operational work, as well as holidays and personal calendar constraints (i.e. resource leveling)?
19. Are project workload reports available for each resource to determine which individuals are under- or over-booked?
20. Are automated alerts available to notify Resource Managers if a resource(s) is under- or over-booked?
21. Can utilization be reported for individual employees, departments or an organization?
22. Can utilization be measured against defined targets for each employee?
23. Can a resource request be created within the solution and routed to a Resource Manager for assignment?
24. Can different Resource Managers be specified for each workgroup?
25. Does the solution provide the ability to manage non-working days?
26. Can non-working days be defined at different levels (resource, workgroup, etc.)?
27. Does the solution provide threshold warnings to alert the resource manager regarding the over or under allocation of resources?
28. Does the solution support Contractors?
29. Is there a difference in pricing between Contractors and Full Time Employees?
30. Does the system support resource management and planning for Non-Human Resources?

Time Reporting

1. Describe the solution’s time reporting capabilities?
2. Do users have a single time sheet for entry of all time or are separate time entry screens required?
3. Describe how the solution manages reporting time that is not associated with projects, such as departmental meetings, training, vacations and sick days?
4. Does the solution provide controls to limit the tasks and projects against which a resource can enter time?
5. If a task has a specific start and end time, is that shown in a resources Timesheet?
6. Does the solution provide vacation tracking?
7. Are reports available to both employees and managers to assist in tracking vacation time?
8. What validation is available when a user enters their time into the solution?
9. Are system checks available to ensure that a minimum number of hours per week are submitted?
10. Can an administrator report time for another resource(s)? Is there any security access associated to this “central reporting”?
11. Are time sheets mandatory in the system or can a Project Manager enter actuals in terms of FTE’s used in the prior month?
12. Can users report time and update task status, including remaining effort and forecast completion date, on a single screen?
13. Can Project Managers report time and update task status, including remaining effort and forecast completion date, on a single screen?
14. Can Project Managers report time and update Project status, including remaining effort and forecast completion date, on a single screen?
15. Describe the time approval process?
16. Can a timesheet submitted by a resource be divided for approval between multiple approvers based upon the project against which time was reported?
17. Describe the process involved when an approver rejects time?
18. Can an individual time record be rejected, while the remainder of the time entries are approved and staged
19. Is cross charging of time supported?
20. Is the invoicing of time supported?
21. Can an administrative or finance user transfer approved time between tasks?
22. Can an administrative or finance user transfer approved time between projects?
23. Can a mobile device be used for time reporting?
24. Does the solution support integration to other time sheet systems?
25. Is there a different cost for a user if they are using an external time sheet from which that time sheet data is imported to your system?

Financial Management

This section is for collecting data on financing, budgeting, forecasting and reporting, e.g. integration with financial management and ERP systems, cost tracking, actuals, budget creation sub-tools, predictions and revenue recognition. It is also the section where you can address queries around supply chain management, bills of materials, reporting of expenses, approvals, cross charges, and so on.

1. Can the system support all phases of project financial management including budgeting, forecasting, and reporting?
2. Does the system provide real-time visibility into project financials?
3. Does the system support multi-currency?
4. Can the system handle the allocation of indirect and overhead costs to projects?
5. Can the system integrate with our existing financial management systems, such as ERP or accounting software?
6. Does the system have the ability to track and manage project-related invoices, purchase orders, and contracts?
7. Can the system support project cost tracking, including actuals, estimates, and commitments?
8. Does the system provide project-level reporting, including financial performance, variance analysis, and cash flow?
9. Does the system have robust security and permissions management, including user roles and access controls for financial data?
10. Can the actuals in the system (time and cost) be manually updated in the system by the Project manager?

Budget Management

1. Does the system have a built-in budget creation tool that allows for customization?
2. Can budgets be created at both the project and portfolio level?
3. Does the budget creation tool have the ability to automatically link to project tasks and activities?
4. Can the budget be easily updated and re-forecasted as the project progresses?
5. Does the system have the ability to track actual spending against budget?
6. How is budget information integrated with other project data and metrics?
7. Can budgets be easily exported and shared with stakeholders?
8. Does the system include reporting and analytics features for budget information?
9. Does the budget creation tool support multiple currencies?
10. What level of support is available for the budget creation tool and how is it provided?

Annual Financial Planning Management

1. Does the system have the capability to manage and track the annual budget setting process, including the allocation of funds to individual projects and initiatives?
2. How does the system support the management and tracking of project budgets, costs, and expenses throughout the year, including updates and revisions to the budget as needed?
3. How does the system handle the integration of project data and budget data to provide a consolidated view of budget performance?
4. What features does the system offer for forecasting and predicting budget performance and trends, and for identifying areas where adjustments may be needed?
5. Can the system integrate with other financial management tools and systems used by the customer?
6. Can the vendor provide references from customers who have successfully implemented and used the system for their annual budget setting process?
7. What is the pricing model for the system, and are there any additional costs or fees for budget management and planning?
8. How does the system handle the reporting and analysis of budget performance data and trends?
9. How does the system handle the management and tracking of changes to the budget during the year, including adjustments and revisions?
10. Can the system provide real-time data and performance metrics for budget performance and trends?

Forecasting

1. Does the system have a built-in project forecasting tool that allows for customization?
2. Can forecasts be created at both the project and portfolio level?
3. Does the project forecasting tool have the ability to automatically link to project tasks and activities?
4. Can forecasting be done manually?
5. Can the forecast be done automatically from the project schedule?
6. Can the forecast be created as a mix of manual entries and inputs from the project schedule?
7. Can the forecast be easily updated and re-forecasted as the project progresses?
8. Does the system have the ability to track actual progress against the forecast?
9. How is forecast information integrated with other project data and metrics?
10. Can project forecasts be easily exported and shared with stakeholders?
11. Does the system include reporting and analytics features for forecast information?
12. Does the project forecasting tool support multiple scenarios?
13. What level of support is available for the project forecasting tool and how is it provided?

Billing, Invoicing, and Revenue Recognition

1. Can invoices be created automatically based upon all approved time, expenses and other charges within the solution?
2. Describe the invoice creation process within the system?
3. Describe how the system provides invoice data to an ERP (where the billing is done by the ERP)?
4. How are taxes calculated on invoices?
5. Are multiple taxes supported?
6. How are taxes applied where the work performed crosses multiple countries or tax jurisdictions?
7. Explain how recoverable taxes are handled by your solution?
8. Can multiple recoverable taxes be managed on a contract?
9. Are invoices automatically routed for approval to the appropriate manager?
10. Does the solution support a multi-level invoice approval process?
11. Are credit notes supported within the solution?
12. Does the solution support multiple invoice formats?
13. How can customer-specific invoice formats be added to the solution?
14. Does the solution include revenue recognition?
15. Outline the revenue recognition methods supported by the solution (physical percent complete, invoice-based, milestone, effort expended, etc.)

Purchase Order Reporting

1. Can the solution be integrated to external Procurement systems?
2. Does your solution allow for Purchase Orders on suppliers to be entered by users directly?
3. Can cost categories be setup and associated with account codes for each department?
4. Does the solution display outstanding balances on Purchase Orders?
5. Does the solution display supplier invoices on Purchase Orders?

Products, Supply Chain, and BoM Reporting

1. Can the solution integrate supply chain information?
2. Describe how the solution integrates supply chain information?
3. Does the system have the capability to manage and track the supply chain for projects, including suppliers, materials, and deliveries?
4. How does the system handle the creation and management of a bill of materials for each project?
5. How does the system handle the tracking and management of product deliveries, including delivery schedules and performance metrics?
6. Can the system integrate with other supply chain management tools and systems used by the customer?
7. What features does the system offer for managing and tracking project budgets, costs, and expenses related to supply chain and deliveries?
8. Can the system provide real-time data and performance metrics for supply chain, bill of materials, and product deliveries?
9. What is the user interface like, and how intuitive and user-friendly is it for managing supply chain, bill of materials, and product deliveries?
10. Can the system handle the reporting and analysis of supply chain, bill of materials, and delivery performance data?
11. What level of support and training is included with the system for supply chain, bill of materials, and product delivery management?
12. Can the vendor provide references from customers who have successfully implemented and used the system for managing their supply chain, bill of materials, and product deliveries?
13. What is the pricing model for the system, and are there any additional costs or fees for supply chain, bill of materials, and delivery management?
14. Can the system display GIS data in relation to supply and product deliveries?
15. How does the system handle the management and tracking of project-related changes to the supply chain, bill of materials, and product deliveries?

Expense Reporting

1. Can the solution be integrated to external Expense Management systems?
2. Does your solution allow for expenses to be entered by users directly?
3. Can expense categories be setup and associated with account codes for each department?
4. Does the solution manage both reimbursable and non-reimbursable expenses?
5. Do expense reports include a workflow for both project approvers and finance approval?
6. Can expense reports include attachments?
7. Are expense creation, approvals, and attachments supported on mobile devises such as phones and tablets?

Cross-Charging

1. Can cross-charges be created automatically based upon all approved time and expenses within the solution?
2. Describe the cross-charge creation process.
3. What types of cross-charge categories are available in the solution?
4. Are cross-charges automatically routed for approval to a designated approver?
5. Does the solution support a multi-level cross-charge approval process?
6. Does the solution provide a cost center structure that is used to distribute cross charge amounts?
7. Can both capital and non-capital costs be identified and calculated for a project?
8. Does the system allow for multiple rates per resource for the same project?
9. When selecting resources on project tasks, does the solution provide visibility into charge and cost rate information?
10. Can rates for overtime be defined in the solution?
11. Describe how the solution manages non cross-chargeable versus cross-chargeable work on a project.
12. Can cross-charge rates be date-driven?
13. Can revenue from a cross-charge be distributed across multiple General Ledger codes?

Portfolio Management

This section is for gathering information about the overall make-up of your SPM solution, i.e. the day-to-day project management aspects, as well as the portfolio planning and profitability calculations, e.g. OKR metrics, vendor roadmap, scenario planning, workflow automation, project prioritization, fund allocation, etc.

Strategic Portfolio Management

1. Does the system support the tracking of business strategies and their associated metrics and OKRs?
2. Can the system generate reports and dashboards for key stakeholders, including executives and managers?
3. Can the vendor provide references or case studies of similar implementations of Strategic Portfolio Management with organizations of similar size and complexity?
4. What is the vendor's roadmap for future development and enhancement of the system?

Project Portfolio Management

1. Can a portfolio be established to measure the performance of multiple projects against configurable metrics and targets?
2. Can a portfolio consist of other portfolios?
3. Are portfolio health metrics automatically calculated from the data entered against the project?
4. Does the project portfolio analysis provide quick links to drill down to the individual projects within the portfolio?
5. Describe how access to portfolios can be restricted by user or role.
6. Explain the ability to track project, program and portfolio budgets through multiple fiscal years.
7. Can the solution accommodate the consideration of any variance (positive or negative) when evaluating metrics, such as cost, effort, planned and forecast information (i.e. earned value analysis)?

Portfolio Planning

1. Describe the process by which demand for IT services is collected from the business units and incorporated into an IT portfolio.
2. Does the solution allow planning scenarios to include the mixing of different types of work: Scenarios that combine new demands and existing projects or portfolios? Does the solution provide comparison between different scenarios?
3. Are configurable fields available to capture the selection criteria and business drivers for an IT portfolio?
4. Can a requirement be tied to the business objectives that it supports?
5. Are there any limits on the number or types of criteria that can be included within the standard analysis capabilities for an IT portfolio?
6. Can new demand be associated to funding sources or high level budgets?
7. Can demand be linked to multiple funding sources in variable percentages to each?
8. Can demand be linked to multiple business strategies in variable percentages to each?
9. If custom attributes are added for portfolio analysis, are custom reports required in order to conduct analysis against these dimensions?
10. Can scenarios be created to represent different mixes of projects and alternate timelines?
11. Can scenarios include all initiatives, projects, project portfolios, and resource demand scenarios?
12. Does the solution allow for the interactive selection of saved scenarios for the purpose of grouping different types of work for comparisons, using cost, effort, benefits, charge amounts, or other important characteristics? Can this be done across fiscal years?
13. Are configurable fields available to capture selection criteria and business drivers?
14. Can configurable fields be located anywhere upon the input forms?
15. Can a requirement be tied to the business objectives that it supports?
16. Can new requirements submitted by business unit based contacts be automatically sent via workflow to the appropriate participant(s) for review and approval?
17. Describe the configurable workflow capabilities for review and approval of new demand.
18. Can links to other web sites or documents be included within the workflow instructions?
19. Can demand items contain an estimated budget by fiscal period and include all types of spend; labor, non-labor, benefits?

Scenario Comparisons

1. Does the solution provide functionality to analyze different potential scenarios of work for total effort, cost, revenue, resource demand, risk, etc.?
2. Does the solution provide a means of totaling the values of multiple scenarios to facilitate more efficient comparison of potential scenarios?
3. Does the solution provide a Resource demand in scenarios by resource type?
4. Does the solution provide a Resource Management demand view?
5. Can the Resource demand be configured by the Resource Manager(s) to create a calendar style view?
6. Describe the process of how Project Managers are notified of any changes to their Projects based on the promotion of a chosen scenario?

Portfolio Tracking

1. Can a portfolio be established to measure the performance of multiple projects against configurable metrics and targets?
2. What type of metrics and targets can be shown in a portfolio view?
3. Describe the various methods and attributes by which projects and other types of work can be associated to a portfolio?
4. Can a portfolio specific project health ranking be calculated based upon a user configurable weighting of project performance metrics?
5. Does the project portfolio analysis functionality provide quick links to drill-down into the individual projects within the portfolio?
6. Can a portfolio be based upon an approved scenario from the selection and prioritization of the demand review phase?
7. Can the actual effort and budgeted amounts for the portfolio be measured against the approved amounts?

Initiative Management

1. Can the solution capture specific initiative information?
2. Can an initiative be linked to the initial demand element from which it was derived?
3. Can specific costing information be set up for an initiative, such as currency, start and end dates, rates, and budget amounts?
4. Can charges for products and external services be included within the initiative charges?
5. Describe the relationship between an initiative, Project, Program, Portfolio and Strategy?
6. Can templates be created for initiatives?

Investment Planning

1. Does the solution provide a means to define top-down financial budgets that categorize different segments of funds available or approved for IT spending?
2. Does the solution provide the ability to define a fiscal year breakdown of funds available for IT spending to allow the segregation of multi-year budgets into appropriate yearly segments?
3. Does the solution include the ability to define the types of work that IT budgetary funds can be allocated against?
4. How many levels of funding source definition does the system include?
5. Can funding source budgets and actuals be 'rolled upwards and downwards'?
6. Does the solution provide the historical tracking of fund information, including to changes to fund allocations and availability?
7. What reports are available to support the investment planning process? Does the system provide a report to identify the level of approved work allocated to a funding source?
8. During the IT investment planning cycle or during project execution, can planning or project records be linked independently to more than one funding source?
9. Does the system make funding source information available to compare and evaluate various business scenarios?
10. Does the solution provide a worksheet style means of managing budget allocations during the IT investment planning process?

Knowledge Management

This section is for collecting knowledge management data, e.g. document management across the enterprise, how to connect with external stakeholders and partners, dashboards and reporting, business process automation, management information (MI), and PowerBI tools.

1. Describe the solution’s Knowledge/Document Management functionality?
2. Is the Knowledge Management functionality native to the product or is it provided through a third party solution?
3. How is security applied to knowledge items in the solution?
4. Can access to knowledge items be limited to a pre-defined set of users?
5. Does the solution impose any restrictions on the types of files that can be attached as a knowledge items?
6. Does the Knowledge/Document Management functionality include check-in/check-out capabilities, as well as version control?

Forms Management

1. Does the system have a built-in form creation tool that allows for customization?
2. What type of forms can be created and what data can be collected?
3. Does the form creation tool have the ability to include data validation and calculation functions?
4. Can forms be easily integrated with other parts of the project portfolio management system?
5. How is data collected through forms stored and managed in the system?
6. Is there a limit to the number of forms that can be created or the amount of data that can be collected through forms?
7. Are there any reporting or analytics features related to the data collected through forms?
8. Can forms be shared and collaborated on with stakeholders outside of the organization?
9. What level of support is available for the form creation tool and how is it provided?

RAID and other Project Related Information Management

1. How does the system handle issues tracking and resolution, including assigning tasks and setting deadlines?
2. Does the system provide risk management capabilities including risk identification, assessment, and mitigation?
3. Can the system model dependencies between tasks, and display them in a clear, intuitive manner?
4. Can the system model dependencies between projects, and display them in a clear, intuitive manner?
5. Can financial information be attached to an item, such as a budget or cost?
6. Does the system support the management of project advisories, including their creation, distribution, and resolution?
7. Can the system provide real-time visibility into project status, including progress, budgets, and timelines?
8. Can the system generate reports and dashboards to provide insight into portfolio performance and risk exposure?
9. Does the system offer customization options to support specific organizational needs and processes, such as relating a log for specific information types?

Business Process Automation

1. Can your application help in the automation of document (Word; Excel; PowerPoint) generation utilizing data from within your application and user entered data?
2. Does your application incorporate the ability to simplify the user experience by establishing new forms or pages which address data entry or management as an intelligent guided process?

Reporting – Business Intelligence

1. Can end-users create custom reports and dashboards within the solution?
2. Is a third party report writer required to develop a custom report for the solution?
3. What skill set is required in order to create custom reports for the solution?
4. What reporting tool(s) are provided with the solution?
5. Does the solution provide OLAP analysis functionality?
6. If the solution provides OLAP analysis functionality, does it require a specific OLAP application?
7. Describe which third party reporting tools have been integrated with the solution?
8. Can reports be created and run within the solution using a web interface?
9. Can access to reports be controlled by role and/or resource?
10. Is GIS mapping available for reporting?
11. Can custom reports include conditional formatting based upon returned values, graphical representation, and/or iconic displays?
12. Can reports and dashboards that would be sent to Stakeholders be made available online?
13. Does the solution's reporting framework provide the ability to schedule reports in order to capture up to date information?
14. Can reports generated by the solution be emailed?
15. If so, what formats are reports sent in?
16. Does the solution's reporting framework allow headers and footers to be included within the printed copy?

Microsoft Office Tools

1. Does your solution have integration capabilities to Microsoft Outlook?
2. Can the system send emails?
3. Does your solution have integration capabilities to Microsoft Teams?
4. Does your solution have integration capabilities to Microsoft PowerPoint?
5. Does your solution have integration capabilities to Microsoft Word?
6. Does your solution have integration capabilities to Microsoft Excel?
7. Can Excel files be imported by a user or is that limited to Administrators?
8. Is an API required for Excel imports?
9. Does your solution have integration capabilities to Microsoft PowerBI?
10. Does your solution have integration capabilities to Microsoft Calendar?
11. Does your solution have integration capabilities to Microsoft SharePoint?
12. Can Visio Diagrams be included in the solution
13. Can the solution output to PDF

Lessons Learnt & Project Required Documents

1. What is the system's capability for tracking and documenting lessons learned from projects?
2. Can the system track documents that are required for each project by Management?
3. Can the system limit a Project from progressing to the next stage of its lifecycle if a defined project document has not been completed?
4. Can the system visually display a list of all documents required for completion within each project in a way that visually represents those that are fully, and partially complete?

Technical Requirements

This section is for gathering technical data about the software solution, e.g. upgrade details, support for mobile, online and user help processes, delivery choices (i.e. SaaS modelling), graphical user interface (GUI), integration, customization and security protocols.

General

1. Is the solution based upon a single database, or are multiple databases required?
2. Does the solution require any specific client-side software?
3. If software is distributed to the user’s desktop, what desktop distribution method is recommended?
4. What is the estimated level-of-effort required to perform an upgrade?
5. Does the solution support mobile devices?
6. What mobile devices are currently supported?

User Help Features

1. Does the system provide an online help feature that can be tailored to the specific needs of the company?
2. Can the online help be sensitive to the page the user is on or the process they are trying to complete?
3. Can the online help feature be customized to follow best practice guidelines for project portfolio management?
4. Is there any additional cost for customization or tailoring of the online help feature?
5. Can you provide examples of other companies who have successfully customized their online help feature to meet their specific needs?
6. What is the process for updating and maintaining the online help feature?
7. Does the online help feature include video tutorials or other multimedia elements?
8. Can the online help feature be integrated with other support resources such as a knowledge base or ticketing system?
9. What is the level of technical support provided for the online help feature?
10. Can customers provide feedback or request new help topics to be added?

Delivery Options

1. Is the solution available as a Software-as-a-Service (SaaS) offering?
2. Can the solution be hosted on premise or only via Software-as-a-Service (SaaS)?
3. Can customers move from a Software-as-a-Service (SaaS) model to on premise if they choose to?
4. Where is the system hosted for SaaS customers?

Integration and Interfaces

1. Does the solution allow data to be extracted into a flat file format?
2. If a Web Services API is offered for the solution, describe the API.
3. Does your system support ESB frameworks?
4. Can the system be configured to send E-mail notifications based on any condition or change in the database?
5. Can e-mail notification conditions be configured in the system without requiring custom objects in the database such as triggers?
6. Can E-mail distribution lists be pre-configured individually for each E-mail template?
7. Can the Project Manager email from the system directly?
8. Are replies to emails sent by a Project Manager retained/stored in the system?

User Interface

1. Does the solution allow any flexibility in the creation and placement of additional configurable fields throughout the system?
2. Does the solution allow system administrators to define a limit to the volume of text which can be entered into configurable fields?
3. Can you describe the user interface of the system, and how it is designed to enhance the user experience?
4. Is the system intuitive and easy to navigate for users with limited technical knowledge?
5. How does the system support user customization and personalization of the interface?
6. Can you provide examples of other companies who have successfully implemented the system and achieved a positive user experience?
7. Are there any user training or onboarding resources available to ensure a smooth transition for new users?
8. Can you provide screenshots or demo videos that highlight the user interface and user experience of the system?
9. What is the process for updating and enhancing the user interface and user experience over time?

Mobile Devices

1. Does the system have a mobile app for project managers and other project resources to use?
2. What features are included in the mobile app?
3. How does the mobile app allow project managers and other project resources to access project information?
4. Can project managers and other project resources upload items through the mobile app?
5. Is the mobile app compatible with both iOS and Android operating systems?
6. Who can access the mobile app?
7. How secure is the mobile app and the information it holds?
8. Can project managers and other project resources receive notifications and updates through the mobile app?
9. Can project managers and other project resources approve or reject requests through the mobile app?
10. How does the mobile app integrate with the project portfolio management system as a whole?
11. Does the mobile app integrate with the phone camera?

Customization

1. Provide a brief overview of the options and tools for integrating the solution with other applications.
2. Are clients allowed to customize the solution without the assistance of the vendor?
3. Are customizations for the solution to be provided solely by the vendor or by an authorized partner?
4. Are customers provided with a full data model and data dictionary?
5. How are the customizations maintained during an upgrade?
6. Describe the ability to configure the solution for specific customer requirements, such as drop-down lists, user-defined fields, custom fields, field labels and field layout.
7. Can the user interface be modified without the need for custom development?
8. Describe the areas within the user interface that can be modified without the need for custom development?

Security

1. Describe how end-user security is implemented?
2. Does the solution support SSL?
3. Describe if the solution can integrate to external user administration or authentication controls, such as Microsoft NT security.
4. Can user passwords be enforced for accessing the system?
5. Can user administration be decentralized?
6. Describe how application and data access can be granted to individual users and groups of users throughout the application?
7. Can access be limited to records based upon geography, roles, or responsibilities?

Vendor Services

This final section is for collecting information about implementation practices and experience; third-party implementation relationships (if any); and training and education services, e.g. web-based, in-person, courseware and “train the trainer” methodology.

Implementation

1. Describe the standard implementation methodology for the solution and provide a sample project plan.
2. Describe the project team required to implement the solution, including all necessary resources from the client, the vendor and a partner. Outline the skills and experience required for the project team.
3. What is the expected duration for an implementation from signing of a contract to completion of the implementation?
4. Are any of the implementation services sub-contracted to third-party providers?
5. Describe any pre-configured options that are available to reduce implementation time?

Training and Education

1. Describe the training options available.
2. Is web-based training available?
3. Is training accreditation available?
4. Can source code for any available training materials be modified to include client-specific information?
5. Describe the courseware that is available to support the solution’s training programs?
6. Is a Train-the-Trainer package available?
7. If a Train-the-Trainer package is available, what materials are included in it?
8. How is documentation delivered to customers?
9. Describe the process for training System Administrators.
10. What skill set is required to administer the solution?