



GUIDE

Creating an RFP for Enterprise Content Management Solutions



Overview

A Request for Information (RFI) or Request for Proposal (RFP) helps organizations objectively evaluate potential vendors and solutions for a specific business need. These formal information requests establish the scope of a proposed software implementation and set the foundation for an objective evaluation process, helping to either qualify or disqualify potential vendors.

RFPs and RFIs are designed to allow organizations to objectively assess how well multiple proposed solutions meet the established business requirements, so they can make informed decisions driven by their unique needs, goals and business drivers, as well as the specific features and capabilities of proposed software solutions. When assessing large-scale software solutions that span multiple business units and imperatives, RFPs become increasingly helpful in identifying which solution is the best fit for your specific business problem.

Developing RFPs and RFIs that will produce the best possible result for your unique needs is a time-consuming process. It can be challenging to determine what exactly to prioritize when developing RFP or RFI documents—what features and capabilities will be most important to your teams, what kind of integrations will be necessary (both now and in the future), what you need to consider in order to ensure the solution is future proof and won't need to be replaced in 5 years as your organization grows and evolves, or as new technologies emerge.

That's why we've created this guide to help organizations successfully navigate the RFP / RFI process.

Enterprise content management RFPs and RFIs tend to be more complex as they incorporate a wide range of functionality. Key areas to consider when searching for an enterprise content management solution include:

- Authoring
- Publishing
- Reuse
- Delivery
- Versioning
- Assessments
- Tagging
- Metadata
- Workflows
- Review Processes
- Translation
- Integrations
- Analytics

When researching enterprise content management platforms, it's important to understand where the various types of platforms fit into the content technology ecosystem, and how the various systems fit together to meet your specific business needs. Does it make sense to try to find one platform that can do it all, or develop your own unique configuration by integrating a variety of tools and systems into your tech stack?

Use this template as a guide to build a comprehensive enterprise content management RFP or RFI that will attract more relevant and informative replies from solution providers and will establish an objective basis for evaluation and selection.

It's important to provide sufficient context, ask all the relevant questions and require the right information in order to objectively understand and assess the essential differences between vendors and solutions, so you can select the vendor that's the best fit for your needs.

Introduction and Background

Use this section to provide relevant background information on your organization. Also provide a brief overview of the purpose of the RFP and make sure you introduce the business problem(s) you aim to remedy.

- **Organization Info** - Name of organization, address and phone number of headquarters or requesting office
- **Organization Scope** - High-level overview of products and / or service offerings
- **Location** - Regions / countries / languages of operation
- **Content Team(s)** - Approximate number of content teams, (authors, instructional designers, SMEs,) and learners / content consumers
- **Content Volume** - Number of teams / departments served, approximate number of deliverables created / managed annually
- **Content Types & Delivery Channels** - platforms and systems where content is created and delivered (include future-state plans in addition to current state needs)
- **Overview of business problem(s) and intent of RFP**

Submission Guidelines and Requirements

Use this section to communicate your expectations for the response package.

- Response deadline
- Requirements for format and contents
- Contact details
- Timetable of events
- RFP issue date
- Due date for supplier questions
- Q&A release date
- RFP response due date

- On-site demonstration dates
- Anticipated contract award date
- Contract start date
- Desired go-live date

Current Content Processes

Use this section to outline your current process.

- Current content development, delivery and management / maintenance workflows
- Current tools / platforms in place
- Required / desired integrations (current state and future state)
- Current pain points / problems to be solved

Project Description & Scope

Use this section to outline objectives and what you envision for the project.

- Future state goals (process, capabilities, integrations, etc.)
- Extent / geography - be sure to indicate whether the initiative is for the entire organization or specific departments, and which products / services, countries / divisions and languages will be included
- Specific goals, strategic business initiatives and requirements
- Necessary features, functionality and integration / data transfer

Evaluation Criteria

Use this section to outline how proposals will be rated. Clearly stated evaluation criteria will show suppliers what's most important to you, resulting in more worthwhile proposals.

Sample Criteria:

- Ability to meet defined functional business requirements and project scope
- Business health of the supplier
- Supplier's credentials and industry relationships
- Supplier's references from current and past clients
- Supplier's demonstrated understanding of [ORGANIZATION] and its requirements
- Supplier's demonstrable ability to achieve cost savings for [ORGANIZATION]
- Supplier's professional services capabilities, methodologies, and technologies
- Supplier products and services manageability and ease of use
- Supplier's demonstrable track record of service excellence
- Supplier's delivery model(s) and governance model
- Net acquisition price of the solution
- Net ongoing operating costs for the solution

Sample Questions

Below are sample questions to consider including in your enterprise content management RFP. These questions can also help you to establish a hierarchy for your evaluation criteria and rank solutions or vendors across categories.

1. General Company Information

- 1.1 Describe the history of your company, including background and experience of the current executive team.
- 1.2 How many years has your company been providing an enterprise content management solution?
- 1.3 What is your customer retention and renewal rate, i.e., what % of your customers stay with you from one year to the next?
- 1.4 Provide the location of your company's HQ and any other offices that would support [ORGANIZATION].
- 1.5 How many customers are currently utilizing your enterprise content management solution?
- 1.6 What is your product roadmap over the next 12 months?
- 1.7 How do you differentiate your offering from those of your competitors?
- 1.8 What data and / or tools can you provide to help our company assess the return on investment (ROI) from your product?
- 1.9 What level of system uptime are you willing to guarantee? When and for how long is your system typically unavailable for maintenance?
- 1.10 If any aspects of your proposal (implementation, maintenance, support, etc.) will be provided by an outsourced partner or VAR, describe the specific elements the partner will provide, how long you have worked with them, how many customers you have jointly worked with, and any other relevant details.
- 1.11 Describe any relationships (personal or professional) your company or any employees have with current or former [ORGANIZATION] employees.

2. Financial Information

- 2.1 Is your company publicly or privately held? If public, list the stock symbol it's traded under. If private, list the majority shareholder. If private, provide enough information for [ORGANIZATION] to understand your company's short and long-term financial position.
- 2.2 What is your company's % sales growth (in revenue) from your most recently completed fiscal year compared to the prior year for the division selling your enterprise content management solution?
- 2.3 When does your fiscal year end?
- 2.4 How many clients using your enterprise content management solution were added and lost in the previous year?
- 2.5 What was your YoY client retention rate for customers using your content management solution?

3. Functional Requirements - Authoring

For each requirement listed below, describe in detail:

- Whether your solution can meet the requirement
 - How your solution will meet the requirement (do not just say "yes" or "our solution offers this;" if unable to fully meet the requirement, provide information on the workaround)
- 3.1** Separates content from presentation
 - 3.2** Uses structured authoring (vs open-ended WYSIWYG)
 - 3.3** Content can be permissioned to users and groups with view, edit, delete privileges
 - 3.4** Content permissions are automatically inherited from folder permissions
 - 3.5** "Owner(s)" for content can be noted / identified in the system
 - 3.6** Subject matter experts for content can be noted / identified in the system
 - 3.7** Ability to add new content authors / licenses without IT assistance
 - 3.8** Allow third party contractors to use authoring license / account
 - 3.9** Ability to search for all content owned by a single author (if that owner leaves role / company)
 - 3.10** Ability to easily transfer all content owned by a single author to one or multiple individuals (if that owner leaves role / company)
 - 3.11** Ability to establish role of content approver / admin to ensure content meets minimum standards before publishing. Describe the different levels of user access
 - 3.12** System supports content in any language
 - 3.13** System supports equations and symbols
 - 3.14** Content can be flagged as Variable Text so it is changed during publishing
 - 3.15** Content can include all common image, audio, and video file types
 - 3.16** Create scenario-based eLearning with branching
 - 3.17** Can be used to create system training / quick reference guides
 - 3.18** Content can include embed code
 - 3.19** Supports accessible content (Section 508 and WCAG)
 - 3.20** Content can include third-party HTML
 - 3.21** PowerPoint slide thumbs can be automatically included in Guide outputs
 - 3.22** Authors can create authoring templates to improve efficiency and consistency
 - 3.23** System can support company-approved fonts
 - 3.24** System can act as a digital asset management site (i.e., host video, images)
 - 3.25** [ORGANIZATION] can create a company-specific dictionary that flags terms / suggested corrections that are not typed correctly
 - 3.26** System can auto-schedule regular / annual content reviews and maintenance and alert those who need to review
 - 3.27** Provide an estimate in hours / minutes that it would take for a content author to re-author a 15-minute eLearning course from a different authoring tool (e.g., Rise, Storyline) in your authoring tool

4. Functional Requirements - Publishing

For each requirement listed below, describe in detail:

- Whether your solution can meet the requirement
- How your solution will meet the requirement (do not just say "yes" or "our solution offers this;" if unable to fully meet the requirement, provide information on the workaround)

- 4.1** Can publish to PDF, SCORM, HTML, MS Word, and PowerPoint
- 4.2** Publishing templates can be modified by customer template admins
- 4.3** Customer can create unlimited number of publishing templates (if there's a limit, describe)
- 4.4** Publishing templates can be easily rebranded
- 4.5** Authors can create micro-updates by updating a specific, changed object while leaving the rest of a document unchanged
- 4.6** Published content supports bookmarking
- 4.7** For SCORM content, settings exist to both permit and restrict free navigation of content
- 4.8** Is there an ability to create custom integrations for content publishing and surfacing?

5. Functional Requirements - Reuse

For each requirement listed below, describe in detail:

- Whether your solution can meet the requirement
- How your solution will meet the requirement (do not just say "yes" or "our solution offers this;" if unable to fully meet the requirement, provide information on the workaround)

- 5.1** Content can be reused at multiple levels
- 5.2** Reused content is flagged in the user interface
- 5.3** System provides a "where used" feature for reused content
- 5.4** System provides a simple way to notify owners of reused content when it is changed
- 5.5** User can "follow" content that they don't own to be notified of changes
- 5.6** Authors can search for content and reuse it without leaving the flow of work
- 5.7** Robust search allows for ease of reuse
- 5.8** Describe how your system handles edits that happen to reused content (ability to have edits flow to all versions, select what versions, etc.)

6. Functional Requirements - Metadata

For each requirement listed below, describe in detail:

- Whether your solution can meet the requirement
- How your solution will meet the requirement (do not just say "yes" or "our solution offers this;" if unable to fully meet the requirement, provide information on the workaround)

- 6.1** Metadata can be added to high and low-level objects

- 6.2 Search can be constrained by metadata
- 6.3 Content can be filtered to specific outputs using Target Output metadata
- 6.4 Content can be filtered to specific audiences using Target Audience metadata
- 6.5 Metadata can be used to customize the publishing process
- 6.6 User can search for keywords in SCORM zip packages from other authoring tools (e.g., Rise, Captivate)
- 6.7 User can search for hyperlinks that exist within content
- 6.8 User can search for keywords in video (in audio and on-screen)
- 6.9 User can search for keywords on images

7. Functional Requirements - Versioning

For each requirement listed below, describe in detail:

- Whether your solution can meet the requirement
- How your solution will meet the requirement (do not just say "yes" or "our solution offers this;" if unable to fully meet the requirement, provide information on the workaround)

- 7.1 System uses a library model of check-in / out to manage versions
- 7.2 New versions are created at each check-in
- 7.3 System provides a visual side-by-side version compare
- 7.4 Prior versions can be rolled forward to become the current version
- 7.5 Prior versions can be published
- 7.6 Authors can copy content from prior versions
- 7.7 Prior versions are stored permanently / immutably

8. Functional Requirements - Workflow

For each requirement listed below, describe in detail:

- Whether your solution can meet the requirement
- How your solution will meet the requirement (do not just say "yes" or "our solution offers this;" if unable to fully meet the requirement, provide information on the workaround)

- 8.1 Content can be assigned to users for design & development tasks
- 8.2 Collaborative, WYSIWYG review is available
- 8.3 Review comments and disposition are saved in an immutable record
- 8.4 Review comments and disposition can be exported

9. Functional Requirements - Translation

For each requirement listed below, describe in detail:

- Whether your solution can meet the requirement

- How your solution will meet the requirement (do not just say "yes" or "our solution offers this;" if unable to fully meet the requirement, provide information on the workaround)

- 9.1** Supports creation of derivatives for translation tagged with language metadata
- 9.2** Allows the content to be exported in XML or XLIFF for external translation
- 9.3** Allows internal translation side-by-side with the source language version
- 9.4** Supports text overlays on images to reduce translation costs
- 9.5** Supports one-time translation of common print strings such as "table of contents" and e-learning UI strings such as "next" and "back"

10. Functional Requirements - Assessments

For each requirement listed below, describe in detail:

- Whether your solution can meet the requirement
- How your solution will meet the requirement (do not just say "yes" or "our solution offers this;" if unable to fully meet the requirement, provide information on the workaround)

- 10.1** Allows authoring of multiple assessment question types including Multiple Choice, Multiple Select, True / False, Sequencing, Matching, Dropdown, Fill-in-the-blank, Drag / Drop, and Image Map
- 10.2** Provides printed exam and exam key publications
- 10.3** Allows authors to specify whether assessment questions and options should be randomized
- 10.4** Allows authors to select a subset of questions from a Question Pool
- 10.5** Allows both unscored knowledge checks and scored assessments
- 10.6** Supports sequencing rules to allow test-out depending on learners' responses to questions
- 10.7** Allows authors to customize feedback displayed based on learners' responses to questions
- 10.8** SCORM packages can be marked complete in different ways (e.g., based on quiz score, based on viewing a percentage of the content / progress)
- 10.9** Allows authors to set / adjust assessment passing score
- 10.10** Allows authors to set the number of times an assessment can be attempted
- 10.11** Supports surveying and evaluation

11. Functional Requirements - Content Delivery

For each requirement listed below, describe in detail:

- Whether your solution can meet the requirement
- How your solution will meet the requirement (do not just say "yes" or "our solution offers this;" if unable to fully meet the requirement, provide information on the workaround)

- 11.1** Supports "permalinks" that always display the current version of publications and can be shared with authenticated and non-authenticated audiences
- 11.2** Allows delivery of the current version of e-learning content through one or more Learning Management Systems (LMS) without the need to re-upload new versions to the LMS

- 11.3** Allows delivery of e-learning content without the need for an LMS
- 11.4** Includes a Learning Record Store to capture content consumption data
- 11.5** Provides analytics dashboards to visualize how content is being consumed
- 11.6** Provides question-level learner data at both the individual and aggregated levels
- 11.7** Provides a permissioned, searchable learner portal for informal consumption of content
- 11.8** Provides APIs to integrate with third-party systems such as Learning Experience Platforms, Learning Record Stores, websites, and in-application support tools

12. Technical Requirements

- 12.1** Describe your solution's deployment options (SaaS, On-Prem, Perpetual Licenses hosted by Service Provider)
- 12.2** Describe your recommended integration approach and architecture, including the names of applications with direct, pre-built integrations
- 12.3** Describe the system's standard web services APIs and technologies (e.g., REST, SOAP)
- 12.4** Do you offer development, testing, training environments? Describe your full footprint
- 12.5** Describe the resource requirements from [ORGANIZATION], including type of skills necessary, to support your solution once implemented
- 12.6** Describe your solution's mobile capabilities
- 12.7** How often does your company produce minor and major releases for the proposed solution? How much notice is provided to customers?
- 12.8** Describe your single-sign-on capabilities and indicate whether you can support the following: ADFS, Azure ADFS
- 12.9** Does your solution support OAUTH 2.0 and SAML 2.0 protocol? If not, when will it?

13. Security

- 13.1** If your organization advances to the final stages of the RFP you will be asked to provide documentation on your Information Security processes, controls, certifications, etc. Please indicate if you're willing to provide this information at a later date.

14. Support

- 14.1** Detail your company's standard support hours of operation, by location; Include how your company handles off-hours calls for emergency and non-emergency support
- 14.2** Would we have a dedicated support contact or support team? If not, what is the ratio of support teams to clients?
- 14.3** Where is your support staff located?
- 14.4** Detail how you notify your customers in the event of both anticipated and unanticipated system outages and / or problems
- 14.5** Provide a copy of your SLAs

15. Implementation

- 15.1** Attach a detailed implementation plan and timeline for rollout of your solution, including milestones and tollgates

- 15.2** Do you offer proof-of-concepts? If so, describe the parameters (price, timeline, scope)
- 15.3** Describe the structure and roles of your company's implementation team
- 15.4** What are the resource requirements from [ORGANIZATION] during implementation? Describe type of skills (business, technical, etc.)
- 15.5** Can your company assist in transferring historical content from our legacy tool to yours? Describe the process

16. Training

- 16.1** Does your company utilize a train the trainer or direct training model?
- 16.2** Is your training via hardcopy, e-copy, web-based?
- 16.3** Describe where training will take place (on-site or off-site), the number of people a training session can accommodate, how long the training session lasts, the ability to customize training curriculum and your company's ability to train in multiple locations
- 16.4** Will you provide training content to train and onboard future administrators?
- 16.5** Does your solution have help, support, knowledge bases, and / or FAQs within the product itself? If yes, please describe. If not, please describe user guides or other reference material available

17. Pricing

- 17.1** Attach detailed pricing in an Excel file for all costs with a separate tab for:
 - a. Implementation costs to include a list of resources, hours / level of effort, and hourly rate or breakdown of costs if fixed price.
 - b. Ongoing solution costs and licensing metrics (e.g., tiers, licensing type - named vs. concurrent user, cost for incremental users, etc.)
 - c. Any other costs and assumptions (test / dev / sandbox environments, training, archiving, data migration, advisory / consulting, etc.)
- 17.2** Indicate how long you're willing to hold pricing (e.g., 3 years for 3-year contract)
- 17.3** [ORGANIZATION]'S standard price cap for a renewal term (typically starting in Year X) is X%. Can you agree to this pricing cap? (e.g., 3% cap typically starting in year 4)

18. References

- 18.1** Provide two current client references that you have been doing business with for three (3) years or longer that have a similar scope of use. Include company name, nature of relationship, contact title, email, and phone number. [ORGANIZATION] will provide notice before we contact references.

19. Terms and Conditions

- 19.1** Have there been any lawsuits or declarations of any legal action against your company for breach of contract for the services being requested under this RFP within the last three years, pending or settled?

- 19.2** Provide a copy of your standard Master Agreement, Maintenance / Support Agreement, Service Level Agreement, and Order Form; When submitted, it is agreed that your proposal IS NOT subject to the acceptance of your terms and conditions (we are asking for informational purposes only as part of the evaluation process)
- 19.3** Attached you will find the following [ORGANIZATION] templates: SaaS Agreement + Order Form to govern any software subscription, and Professional Services Agreement and Statement of Work (SOW) to govern professional services provided during implementation and / or throughout the term of an agreement; Please indicate if you are willing to use these templates, if your company is selected to move forward to the contracting phase
- 19.4** [ORGANIZATION]'S payment terms are X from receipt of invoice with payment via ACH. Indicate if you will accept these terms, or if you will offer an early payment discount (e.g., 3% 15, Net 45)
- 19.5** [ORGANIZATION] requires a not-to-exceed amount for any Professional Services performed on our behalf on a time and materials basis; Indicate if you are willing to offer this type of payment model
- 19.6** [ORGANIZATION] expects payment for any Professional Services performed on a fixed-fee basis to follow a milestone payment schedule with invoicing tied to completion and acceptance of project milestones; Indicate if you are willing to offer this type of payment schedule



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About Xyleme

Xyleme provides a unified solution for content authoring, management, delivery, and syndication at a scale. Our industry-leading CCMS platform facilitates the efficient mass-production of learning content and makes updating and maintaining content simpler, creating a truly scalable solution for global enterprises.

Xyleme empowers companies to transform how they create and broadcast content across their organizations. Our Fortune 500 customer base, which includes Cisco, 3M, and VMWare, just to name a few, trusts Xyleme to deliver Content as a Service solution (CaaS) to the most strategic and dynamic segments of their businesses.

Our customers use their content as a competitive advantage to scale quicker, deliver products to market faster, and ensure their talent is always ready to respond to ever-changing market dynamics.

Founded in 2004, Xyleme is headquartered in Denver, Colorado.

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