

This document is a guide to the RFS process after the RFS draft has been written.

Each RFS project varies with the client to maximize the overall result. So this guide will be tailored to each client’s situation. For example, client personnel may not have the time available to speak to vendors at least in the initial stages. So this responsibility may fall back on Access Systems, etc.

Whatever process procedure is decided on, all project team members must agree to maintain written documentation of their involvement in the process to the extent possible. This may involve the following:

- Confirmation email to other team members of verbal conversations as appropriate
- Forwarding emails to other team members
- Retaining project documentation and emails

GOAL: A successful choice and implementation of an overall business software solution that will serve Client X’s foreseeable needs for many years to come in an effective and efficient system that can be maintained by Client X personnel with some reasonable level of outside assistance.

Client X Project Team for Business Operations Information System project (BOIS):
 Person A, Project Leader
 Person B, Executive Sponsor

Plan Step		Responsibility/Discussion
01	Q: Vendor geographic location constraints, if any and other vendor/author criteria such as size, etc. <ul style="list-style-type: none"> • Software author • Implementer • Third party software 	
02	Realistic maximum capital budget including technology. Is there a difference if done in phases or via a lease? a. Annual budget for maintenance and support including any program updates. Typically software maintenance ranges from 16% to 25% of SLP (standard list price)	
03	Present RFS draft and RFS plan to Client X managers for final review. Also discuss if any vendors need to be added to vendor list or excluded based on previous experience.	
04	Revise RFS and RFS plan until a consensus is reached that documents are a satisfactory starting point.	ASI with Client X project team and input from Client X staff
05	Decide on initial vendor list. Use product reviews and other tools to narrow or expand the selection. The objective is a rough congruence with RFS, not an exact match.	ASI with input from Client X staff

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