



# BEST PRACTICE: ANALYZING YOUR RFP PROCESS

A Workbook To Define Requirements & Optimize Efficiencies



phone: 610.287.1139  
email: [support@i-rfp.com](mailto:support@i-rfp.com)  
web: [www.i-rfp.com](http://www.i-rfp.com)

171 4th Street  
Schwenksville, PA 19473



## RFP Process Analysis

The following “talking points” are meant to help you and/or your team evaluate your current litigation support RFP process and determine your specific requirements that will pay off in increased efficiency and decreased costs.

Please complete the following analysis and contact us to discuss. We will evaluate your input and provide you with feedback, comments and suggestions regarding your specific needs (at no charge to you). You may also insert text and edit the form to further document your needs and requirements. There are no requirements to complete all of the questions. However, the more information provided the better it will be for us to help evaluate your current processes.

The information in this form is kept confidential and will only be used by i-RFP to evaluate your specific RFP needs for litigation support project bids. At no time will i-RFP sell or otherwise distribute any information received from this form.

### 1. What types of projects do you generally outsource to Litigation Support Vendors?

- Copying/Duplication
- Imaging/Scanning/OCR/Coding
- EDD – Electronic Data Discovery
- Trial Presentation
- Other(s): \_\_\_\_\_

### 2. How often do you outsource new litigation support projects to vendors?

Copying/Duplication	Imaging/Scanning/OCR/Coding	EDD	Trial
<input type="checkbox"/> Daily	<input type="checkbox"/> Daily	<input type="checkbox"/> Daily	<input type="checkbox"/> Daily
<input type="checkbox"/> 15 or fewer times a month	<input type="checkbox"/> 15 or fewer times a month	<input type="checkbox"/> 15 or fewer times a month	<input type="checkbox"/> 15 or fewer times a month
<input type="checkbox"/> 10 or fewer times a month	<input type="checkbox"/> 10 or fewer times a month	<input type="checkbox"/> 10 or fewer times a month	<input type="checkbox"/> 10 or fewer times a month
<input type="checkbox"/> 5 or fewer times a month	<input type="checkbox"/> 5 or fewer times a month	<input type="checkbox"/> 5 or fewer times a month	<input type="checkbox"/> 5 or fewer times a month

### 3. Briefly explain your current process that is used to create, distribute, analyze and award your litigation support RFPs

(Examples: primarily paper-based/manual process, call and/or email preferred vendors with a brief overview and record rates, use multiple applications (Word, Excel, Email) to create, distribute and analyze project rates or maybe your firm doesn't have a defined process yet)

---



---



---



**4. What are some of your main reasons you do not distribute an RFP for each of your outsourced projects to litigation support vendors?**

(Examples: Lack of time due to deadlines, other pressing tasks, etc., not required by our clients, lack of a system to manage your process, firm-wide RFP process has not been defined/approved/implemented for litigation support projects at the firm)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**5. How much time is lost by managing your RFP projects using your current process?**

(Tasks include: create, distribute, collect, analyze, team/client approval, award project to preferred vendor and update other vendors that project is closed)

Copying/Duplication	Imaging/Scanning /OCR/Coding	EDD	Trial
<input type="checkbox"/> 1 hour per project	<input type="checkbox"/> 1 hour per project	<input type="checkbox"/> 1 hour per project	<input type="checkbox"/> 1 hour per project
<input type="checkbox"/> 2-4 hours per project	<input type="checkbox"/> 2-4 hours per project	<input type="checkbox"/> 2-4 hours per project	<input type="checkbox"/> 2-4 hours per project
<input type="checkbox"/> 5-8 hours per project	<input type="checkbox"/> 5-8 hours per project	<input type="checkbox"/> 5-8 hours per project	<input type="checkbox"/> 5-8 hours per project
<input type="checkbox"/> 9+ hours per project	<input type="checkbox"/> 9+ hours per project	<input type="checkbox"/> 9+ hours per project	<input type="checkbox"/> 9+ hours per project

**6. How would you like to improve your current RFP process?**

(Examples: automate routine tasks, eliminate duplication, consolidate the complete process into a single system, create a fair bid process, archive and easily access historical response data from past projects, minimize costs and time delays associated with current process, implement a cost-cutting solution to increase profitability and decrease costs/expenses, proactively manage costs for your clients)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**7. How would you respond, if a client or potential client would ask the following:**

- How does your firm differentiate itself in terms of litigation support cost-saving measures?  
\_\_\_\_\_
- What process is used to efficiently manage litigation support costs for your clients?  
\_\_\_\_\_
- What is the firm’s plan to improve your RFP process and help decrease our costs?  
\_\_\_\_\_
- How does your firm ensure it is providing cost-effective projects?  
\_\_\_\_\_



**8. How would an improvement over your current RFP process positively impact your expenses over the next four quarters?**

	Q1	Q2	Q3	Q4
Reduced Costs	\$	\$	\$	\$
Avoided Costs	\$	\$	\$	\$
Total Savings	\$	\$	\$	\$

**9. What might you be gambling or sacrificing by not bidding all projects to your preferred vendors?**

(Examples: client satisfaction, unnecessary and repetitive tasks that eat away at your time)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**10. What challenges are you facing in managing litigation support RFPs for your clients?**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**11. How valuable would it be to the firm to have a system like i-RFP?**

(Examples: another way to promote to clients that your firm looks to proactively improve efficiency and minimize costs, maintain or increase profitability, eliminate wasted and repetitive tasks)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**12. When do you find yourself bidding projects?**

(Examples: when the client asks, on larger projects only, it's a standard practice for all projects in our firm)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



**13. What would you most like to change about your current RFP process? What results or positive impact would these changes have to your bottom line, time or productivity?**

Changes needed for current process

Results and Positive Impact from these changes

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**14. What are your biggest headaches/frustrations in regard to your current RFP process?**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**15. What's the risk and cost of doing nothing to improve your RFP process?**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**16. What would your "perfect" RFP solution include? What would you want to make sure it could do?**

(Examples: ready made and detailed RFP templates, improve the communication and clarity of your bid requests to preferred vendors, create a structured and consistent process that prevents incomplete project specifications, control and guide vendor responses to obtain only relevant information, print or export to Excel vendor responses for off-line evaluation, one click of the mouse simultaneously awards the winning vendor and informs other participating vendors that the project has been closed, ensure a fair and consistent process, archive and easily access historical response data from past projects)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**17. What improvements to your current RFP process would help you to achieve the greatest results?**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_