Blackline

RFP Guide and Template

Outsourced Services – Human Resources RFP

May 15, 2020

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I. Introduction and Use of the Guide

The Blackline RFP template is intended to assist procurement professionals in the creation and execution of a wide range of RFPs across industries and procurement spend categories. Although organizational and product/service needs vary, this template is a useful starting point from which to configure and customize to meet your company's specific needs.

This RFP is part of a series Blackline has identified as opportunistic and relevant based on current macro and micro economic factors, common stakeholder engagements, and complexity.

For additional information and access to pricing and scoring worksheets, please contact Blackline to speak with one of our industry experts on how we can Power Up your procurement function with our inclusive back-office support, on-site procurement services, or Blackline's Procurement Roadmap which has transformed some of the world's largest companies covering more than $100 billion in spend. It is Blackline's commitment to bring people together to elevate procurement's role and results!

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II. Request for Proposal: Outsourced Services - HR

A. RFP Document

1) Company Overview:

Overview Insight [*delete italics and replace with your information*]

Provide a brief overview of your organization providing relevant context for participating suppliers.

a) *Corporate mission*
b) *Portfolio of products/services*
c) *Employee count*
d) *Geographical footprint*
e) *Company culture*
f) *Principles and values*

Sample:

[enter Company name] is the world's largest service provider with more than 80 million members in 100 countries and territories around the globe.

Our mission: Create mutually beneficial opportunities for every one of our customers. Our customers get access to [list all services] helping you be successful. [enter Company name] started out in the garage of our co-founder John Doe in [enter date] and has grown to the size of [enter detail].

John Doe is the CEO, and the company's management team is made up of seasoned executives who share a common vision and end-goal. [enter Company name] has a diversified business model with revenues coming from several different services and products.

2) Objective:

Objective Insight [*delete italics and replace with your information*]

Thoroughly describe the objective of this RFP with as many pertinent details as possible to ensure a clear and comprehensive vision is shared with suppliers. Adding all applicable details including historical and forecasted data, impacted business units, timelines, and expectations will reduce the number of questions suppliers have following the dissemination of the RFP.

Objective Sample:

The objective of this RFP is to ascertain capabilities and execution of [enter HR outsourced service(s)] to be provided to [enter Company name]. The awarded supplier(s) will be able to provide best-in-class [enter outsourced service(s)] covering [enter high-level requirements] across our geographic footprint (see section 6 for geographic locations pertinent to this RFP). It is vitally important to [enter Company name] to find a partner(s) who will meet or exceed all [enter outsourced service(s)] requirements while continually discovering avenues to improve.

3) Background:

Background Insight [delete italics and replace with your information]

Provide a wide-ranging history of desired [enter service/product] to offer suppliers an understanding of where your company has been and how you arrived at your current [service/product] state of requirements. Where possible, omit all current negative service levels to protect the organization from predatory bidding and to ensure strong partnering and continuity of supply with the incumbent supplier.

Background Sample

Over the past five years [enter Company name] has operated [enter outsourced service(s)] in a fractured state encompassing augmented solutions to accomplish [enter service output]. There are several systems and applications which will be decommissioned in [timeline] which require the support of [service]. [enter Company name] will require a partner to assume all services within [scope of RFP].

The selected supplier will partner with the [HR team] to execute day-to-day operations for [enter service(s)].

Current applications and systems include: [List here (Oracle, Workday, etc.)]

4) Service Requirements:

Service Requirements Insight [delete italics and replace with your information]

Provide a list of requirements suppliers can turn to for an easy go-to list to ensure all components are considered when submitting bids.

Service Requirements Sample:

Transition Approach and Personnel

Should [enter Company name] select a new supplier, the [enter Team name(s)] will require a team to seamlessly transition steady-state services to ensure there is no impact to the

business units supported. The solution will require a proactive roadmap to ensure a successful transition. [Enter Company name] is, potentially, looking for transition support in the following areas:

a) *Recommend and support [service's] best practices for 10,000 [Company] employees*
b) *Strategic partner for all [services] concerning [applications]*
c) *Research and resolve [services] issues*
d) *Manage expedited [service] requests*
e) *Run weekly/monthly/quarterly/yearly data reports for leadership consumption*
f) *Support ad-hoc requests*
g) *Educational materials and interactive tools to assist with [services]*
h) *Rapid response to all [Company] leadership*
i) *Software integrations*
j) *Service desk processing*
k) *Steady state operations*
l) *Software testing*
m) *Process road-mapping*
n) *A dedicated transition project manager*
o) *Go-Live by] Month Day, Year]*

Implementation

[Enter Company name] will require a comprehensive plan which aligns to the objective of this RFP to ensure [Services] are implemented within the timeline provided (seen in the timeline section of this RFP). The implementation solution should detail all requirements required of [enter Company name] – please see the list of resources [enter Company name] will provide for the implementation (below). Please provide insight into any constraints foreseen for the implementation as well as offering best practices seen in and out of [industry].

5) Current/Future Resources Structure:

a) *Account management*
b) *All [enter outsourced service(s)] (work with stakeholders and SMEs here)*
c) *Personnel*
d) *Tactical day-to-day requirements*
e) *Strategic approach and execution*
f) *Timelines*
g) *Technologies*
h) *Software*
i) *Integrations*

j)   Implementations

[Enter Company name] Allocated Resources

a)   Project Manager: 1FTE
b)   IT Security Director: .25 FTE
c)   Account Manager(s): 3.5 FTEs

6)   Countries of Operation:

Countries of Operations Insight [delete italics and replace sample with your information]

Provide a list of countries and employee counts for each to provide the supplier insight into your company's applicable geographic footprint and employee or customer counts.

Countries of Operations Sample

Countries of Operation (Number of Employees)			
Bangladesh (45)	*France (230)*	*Japan (50)*	*Russia (15)*
Brazil (167)	*Germany (50)*	*Mexico (65)*	*Thailand (55)*
China (55)	*India (325)*	*Nigeria (30)*	*Turkey (30)*
Egypt (37)	*Indonesia (75)*	*Pakistan (40)*	*UK (125)*
Ethiopia (21)	*Italy (51)*	*Philippines (300)*	*US (3,250)*

7)   SLAs, KPIs, Metrics:

SLA, KPI, and Metrics Insight [delete italics and replace sample with your information]

Communicate required SLAs and metrics in the RFP accurately for scope and the products relevant to this RFP. An option here is to add high-performance or incentive targets which are incremental service offerings above what stakeholders have required. Ensure costs are understood to reach standard SLAs as well as high-performance targets to gauge cost ratios to service deliveries. Again, ensure all metrics are measurable. If unknown, ask the suppliers to provide recommended KPI/SLAs.

Please see the SLAs and metrics which will be used to govern this program. These metrics have been reviewed and approved by all stakeholders.

SLA	Measure Definition	Service Default	Incentive	At Risk Fees/Incentives
1	*Average Time to Completion [service(s)]*	*2 Business Days*	*1% Quarterly Fee*	*1% Quarterly Fee*
2	*Quality of [service]*	*97%*	*1% Quarterly Fee*	*1% Quarterly Fee*

3	*Business Approval Survey*	*95%*	*1% Quarterly Fee*	*1% Quarterly Fee*
4	*Critical Ticket Resolution Time*	*1 Business Day*	*1% Quarterly Fee*	*1% Quarterly Fee*
5	*Non-Critical Ticket Resolution Time*	*2 Business Days*	*1% Quarterly Fee*	*1% Quarterly Fee*

8) Questionnaire:

Questionnaire Insight [delete italics and replace with your information]

Deliver the most comprehensive list of questions possible for Procurement and key decision makers to adeptly understand the suppliers, their approach, and service deliveries in a side-by-side model which promotes specificity, organization, and decision making in the RFP bid analysis process.

Questionnaire sample:

Supplier Information:	1. *Please describe your organization and management structure, particularly with respect to your [service/product]. Please include primary locations and key contacts who will be supporting [enter Company name].*
	2. *How does your company provide an operational competitive advantage over your competitors?*
	3. *Describe any significant relationships your company can offer regionally with reference to the scope of this RFP.*
	4. *Is your company currently or expecting to be involved in any mergers or acquisitions which will have any impact [service/product] offering?*
	5. *Is your company categorized as a small or diverse business?*
	6. *How does your company weigh the satisfaction of its employees to operational results and failures? Please provide detailed examples.*
HR Outsourced Services HR Outsourced Services Offerings	1. *Please describe the ideal [enter outsourced service(s)] offering model your company can provide leading to immediate and future mutual success. Including, but not solely limited to, external resources, technology, business intelligence, process excellence, subcontractors (please provide list of all applicable third-party suppliers), etc. How does your company's [enter outsourced service(s)] offering differentiate your company from your competitors?*

	2. *Please describe and define how your company trains staff for both client delivery and required skill sets. Please differentiate hard and soft skill capability as they pertain to [enter outsourced service(s)] offerings.*
	3. *Please provide detail into your company's process, methodology and approach to providing scalable service levels [provide specific example here].*
	4. *How does your company manage continuity challenges on a day-to-day basis? What are your methodologies for forecasting and proactively addressing disruptors?*
	5. *How does your company limit personal identification information (PII) with regarding to [enter Company name] employees?*
	6. *What are key success factors for your most mature and successful clients for [enter outsourced service(s)]?*
	7. *In detail, please describe how your company can scale [service/product] deliverables by quantity and enter Company name geographic footprint.*
	8. *Please describe how your company stays current on market trends.*
	9. *Is your company able to utilize [enter Company]'s directed providers and partners?*
	10. *With specificity, please detail how your company utilizes technology to optimize [service/product] offerings. What types of technology are currently being used?*
	11. *What benchmarking resources does your company provide and/or utilize?*
	12. *How many new clients have you secured over the past twelve (12) months? How many, if any, are in the same industry as [enter Company]?*
Account Service Support	1. *Please describe and detail a full end-to-end implementation process including, but not limited to, resource availability in [enter required timeline here], an implementation timeline with samples from previous clients, roles, responsibilities, and expected level-of-effort from both your company and [enter Company name].*
	2. *Will the IT implementation team be centrally located or local? Please detail global limitations and opportunities (if applicable).*
	3. *Can you guarantee go-live by xx/xx/xxxx*
	4. *Describe a comprehensive service operation for [enter Company name] regarding global hours of operation, call*

	centers, dedicated resources, language restrictions, on-shore/off-shore resources, quality control, responsiveness to operational queries and escalations, QBRs, and other operational account governance.
	5. Please confirm you company's ability to support all countries as listed in this RFP and outline any existing or potential service constraints.
	6. Please provide overview of critical SLA/KPIs where possible and how they're utilized to drive a best-in-class program. Additionally, please describe how your company plans to meet the SLA/KPIs listed in the scope section of this RFP.
	7. Is any portion or all program administrative responsibilities outsourced? If so, please provide supplier(s) and detail the management of the applicable supplier(s). Will [enter Company name] be notified of outsourced suppliers?
	8. Though not required at this stage, if so desired by both parties in the future, do you have resources available to administer the program for [enter Company name]?
	9. Please provide the implementation project manager(s) and their brief resume (both in industry and with your company) who will service our account. If selected, [enter Company name] will ask for your company to lock-in this resource pursuant to the executed SOW.
	10. Do you have dedicated tools provided for our Program Administrators? Provide best practices around service policies and procedures. Please detail the system, compatible browsers, and their reporting capabilities. Is a test environment available?
Systems, Integrations, and Reporting	1. Pursuant to the detailed scope of this RFP, please describe, in depth, how your systems will interface with [enter Company name] [enter ERP or other required systems here]. If we're to access your web-based portals, are you able to customize your site with [enter company]'s logo and other specific requests?
	2. Will [enter Company name] require any augmenting or new technology to enable automation or integration?
	3. Based on the information of this RFP, will customized programming be required to accomplish any integrations?
	4. Web-based platform is compatible with Chrome and IE
	5. Information Security/Data Privacy – Please list all applicable certifications
	6. What type of customizations do you allow for your platform?

	7. *How does your company handle production and business-level IT support? Do you have a case management system? How are priorities assigned?*
	8. *How often does your company release new code into the platform? Are release notes shared with customers prior to releases in the event there are customer customizations?*
	9. *Are management reports available from a secured web site? Describe how reports can be customized by category, person, department and other common metrics. Will your company be able to provide a demo as well as samples of available reporting?*
Technology Support & Disaster Relief	1. *What technical support is available for your technology and reporting packages and what hours is technical support available? Can data be consolidated on a global scale?*
	2. *Provide an explanation of the support structure for issue escalation in your IT organization.*
	3. *Will [Company] be provided with a permanent test environment? What is the testing support for clients when client has a system change or updates (IE Oracle)? What is the testing support for clients when client has a system change or update to platform(s)? How much advanced notice must be provided for dedicated IT testing support?*
	4. *Describe your IT infrastructure.*
	5. *If applicable, does your company provide mobile applications?*
Contract & Pricing	1. *Please see the Master Services Agreement for this engagement [attached] and return review and edits with your RFP submission.*
	2. *Please confirm the proposed pricing to [enter Company name] is that which is offered to your top-tier customers.*
	3. *Please review and fill-out the rate sheet [attached] and return with your submission of the RFP.*
	4. *How can [Company] maximize its financial incentives and positioning based on the known requirements of this RFP?*
Risk	1. *Are there any changes or modifications to the current business model and offering which would alter delivery of [services/product] to [enter Company name]?*
	2. *How do does your company manage risks to the organization and customer base?*
	3. *Please provide your Dun & Bradstreet number:*

	4. When risks are discovered within your company, how quickly do you provide feedback to your customer base?
Quality	1. How does your company measure a seamless and customer-friendly implementation (where applicable)?
	2. Once implemented/integrated, how does your company measure a successful customer over a three-year engagement?
	3. How do you maintain excellent customer service and account support? Please provide examples.
Innovation	1. Please outline any innovative strategies your company has implemented in the past three (3) years and what innovations are in pipeline for the coming three (3) years.
	2. How does your company measure internal innovation to that of your closest competitors?
	3. Are test environments made available to [enter Company name] prior to upgrades?
	4. How does your company integrate innovative upgrades without impacting the customer's current day-to-day business?
Cultural Fit	1. Based on your understanding of [enter Company name] culture and vision; how will your company align with our core values and people?
	2. What does your ideal customer look like?
	3. From a cultural and internal personnel standpoint; how is your company cultivating itself and investing in its people? What is your five (5) year plan?
	4. Please define your company's communication approach and service process in detail.
	5. What have been the results of your most recent employee satisfaction/engagement surveys?
References	1. Please provide a minimum of three (3) customer references who are of like size and scope as [enter Company name].
	2. Please provide one (1) potential customer reference who engaged your company in the RFP, however, did not award you.
	3. Please provide one (1) reference of a previous customer who has left your company in the last twelve (12) who was procuring the same services as [enter Company name].

9) Pricing/Rate Sheet:

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Pricing/Rate Sheet Insight [delete italics and replace with your information]

Set a specific rate sheet can be beneficial for suppliers to provide bids. This is also advantageous to the key decision makers at it provides a side-by-side costing analysis of services. An approach to consider is to eliminate a rate sheet and allow for suppliers to provide a cost structure which they believe will be a best fit for the organization. In this approach, ensure normalization of bids is possible.

Pricing/Rate Sheet Sample

Pricing
Worksheet.xlsx

10) Timeline

Timeline Insight [delete italics and replace with your information]

Create an in-depth RFP timeline with coordination from all stakeholders (BU, IT, Legal, etc.). This will provide significant advantages in maintaining timeliness, strong engagement and project management.

Timeline Sample

Please review the RFP timeline (below) and contract [RFP owner] with any questions or concerns.

Action	Date	Accountability
NDA signed and returned	*xx/xx/xxxx*	*Suppliers*
RFP Document Issued	*xx/xx/xxxx*	*Company*
Intention to Participate	*xx/xx/xxxx*	*Suppliers*
RFP clarification Deadline for Vendor questions Q&A's received	*xx/xx/xxxx*	*Suppliers*
Q&A Calls	*xx/xx/xxxx – xx/xx/xxxx*	*Suppliers & Company*
RFP Submission Date	*xx/xx/xxxx*	*Suppliers*
Supplier Presentations – On/Off Site	*xx/xx/xxxx*	*Suppliers & Company*
Down Selection of Shortlist Vendors	*xx/xx/xxxx*	*Company*
Discussions with Shortlist Vendors (potential requirement for site visits)	*xx/xx/xxxx – xx/xx/xxxx*	*Suppliers & Company*
Contract and Pricing Negotiation	*xx/xx/xxxx – xx/xx/xxxx*	*Company*

Award	*xx/xx/xxxx*	*Supplier & Company*
Planning	*xx/xx/xxxx – xx/xx/xxxx*	*Supplier & Company*
Kick-Off Implementation	*xx/xx/xxxx – xx/xx/xxxx*	*Supplier & Company*
Go-Live	*xx/xx/xxxx*	*Supplier & Company*

11) Terms and Conditions

Work with your Legal department on a comprehensive list of terms and conditions for RFPs to ensure all liabilities are covered. [delete italics and replace with your information]

a) *This RFP is for discussion and evaluation purposes of the contemplated transaction only. Submission of a response to this RFP is expressly conditioned upon Vendor's agreement to the terms set forth herein. For clarity, this RFP or any response from Vendor to this RFP shall not constitute a binding agreement until Vendor and Company have duly executed one or more definitive agreements. Company and the Vendor shall be bound by the terms of the mutual confidentiality and non-disclosure agreement entered between the parties.*

b) *Company reserves the right to accept other than the apparent lowest priced proposal and to accept or reject any proposal in whole or in part or reject all proposals with or without notice or reasons. Company may amend, supplement, or withdraw the RFP at any time.*

c) *All answers to this proposal must be numbered as per the corresponding number of each question and must follow the same format as this RFP.*

d) *Quantities stated in this RFP are for informational purposes only and shall not be binding on Company. Such information supplied by Company is for the convenience of the respondents only and Company makes no warranty regarding the accuracy of any data or information provided.*

e) *Any costs incurred by a respondent to this RFP in connection with the preparation or submission of a response or any other expenses attendant thereto are the sole responsibility of that respondent and neither Company nor any of its business units, affiliates or subsidiaries has any obligation, under any circumstances, to reimburse or otherwise compensate the respondent for expenses so incurred.*

f) *Respondent shall not issue or cause the issuance of any press release or other publication of the existence of this RFP without the prior consent of Company.*

g) *Respondent shall not publish photographs or articles, make speeches about, or publicize the existence or scope of any agreement resulting from this RFP without first obtaining prior written consent from Company.*

h) *The preparation of a response to this RFP shall serve as evidence of the respondent's acceptance of the terms contained herein.*

i)   *If a respondent should decline to offer a proposal, all materials and information received pursuant to this RFP shall be promptly returned to Company and any copies made thereof shall be immediately destroyed.*

j)   *This RFP, all information contained herein, and all Company specifications and samples provided herewith shall be considered Company confidential information and subject to the mutual confidential disclosure agreement by and between respondent and Company.*

k)   *All suppliers receiving such documents shall use them solely for responding to this RFP.*

l)   *The information contained or referred to in the RFP is not to be used, disclosed or released for any other use or purpose and must be returned to Company or destroyed when requested.*

III. Supporting RFP Materials

A. Supplier List

Enter suppliers in the tracker (below). Organizing suppliers and their profiles will assist with supplier communications as well as on-going negotiations throughout the RFP.

Supplier	Supplier Contact	Contact Phone	Contact Email	NDA Signed	Current Supplier	Current Supplier Spend	BUs Supported	Supplier Risk
1	*John Doe*	*(xxx) xxx-xxxx*	*@company.com*	*Y/N*	*Y/N*	*$0.00*	*Marketing, HR, etc.*	*Low, Med., High*
2								
3								

B. RFP Assessment

Partner with all key decision makers to determine scoring criteria and associated weights. Aggregate scoring from all stakeholders and present the findings. This will provide talking points, maintain engagement and generate an award output for the supplier who scores the highest which will greatly assist in the decision-making process. The worksheet (below) is preconfigured for an assessment.

Supplier Assessment Worksh

IV. About Blackline Group

Blackline has been helping companies overcome critical procurement issues for more than a decade. In that time, we've helped some of the world's largest companies transform more than $100 billion in total spend.

Blackline's agile approach aligns with customer's desire for easy to consume improvements. The results speak for themselves; our clients are consistently awarded top industry honors for setting the bar in Procurement.

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