

Request for Proposal Sample Guide

To support a smooth evaluation process, ask vendors to follow a structure similar to the one outlined in this guide. Aligned responses make it easier to compare solutions, speed up internal reviews, and enable a more objective scoring process.

1. Q&A Process and Timeline

- **Key dates for RFP questions, submission instructions/deadlines, and vendor presentations**

Outline a clear timeline to align vendor expectations and ensure a smooth selection process. A table like the one below helps visibly outline key dates and milestones:

Event	Deadline
Issue Request for Proposal and NDA to Vendors	[Date]
Vendor On-Site Visits	[Week Timeframe]
Proposals Due from Vendors	[Date]
Final Presentations	[Week Timeframe]
Vendor Selection and Contract Award	[Date]
Vendor Begins Approval Drawings (Post LOI & Deposit)	[Date]
Equipment Delivery On-Site	TBD by Vendor
System Installation	TBD by Vendor
Operational Testing & Final Acceptance	TBD by Vendor
Operations and IT Training	TBD by Vendor
System Fully Operational	[Date]

- **Contact person for RFP clarifications**

Assign primary and secondary points of contact for vendor questions to maintain consistency in communication and streamline information sharing.

2. Company Introduction

- **Brief company overview**

Provide a short summary of your organization, including industry, core operations, and relevant facilities – this helps vendors understand your operational landscape and business needs.

- **Summary of project objectives**

Briefly describe the location of the project, why you're pursuing automation and what you hope to achieve (e.g., improved throughput, reduced labor costs, enhanced order accuracy).

- **Key outcomes expected from the project**

Define measurable goals like targeted productivity increases, labor reduction percentages, or fulfillment speed improvements.

3. Project Scope

- **Description of current operational environment**

Explain your existing processes, systems, and workflows, giving vendors the necessary context for their solution design.

- **Challenges you're seeking to address**

Highlight specific operational pain points such as labor shortages, peak season pressures, or order accuracy issues.

- **Functional and performance requirements**

Detail must-have capabilities, performance thresholds, and technical requirements (e.g., daily order throughput, accuracy rates, system uptime).

- **Facility details (if applicable)**

Include facility size, ceiling height, layout diagrams, and any infrastructure considerations that could impact the solution design.

4. Vendor Information

- **Company history and background**

Request a brief company profile to gauge stability, industry presence, and operational footprint.

- **Relevant experience in the industry**

Ask vendors to highlight projects or clients with similar industry challenges or business requirements.

- **Financial stability and ownership structure**

Understand the vendor's financial health and long-term viability, especially for critical automation investments.

- **Certificate of Insurance**

If it's important to your organization, have the vendor define their general liability insurance, or provide a copy of their certificate.

5. Solution Overview

- **High-level description of proposed solution**
Ask for a summary of the proposed system, including key technologies and general workflows.
- **Technology overview and key differentiators**
Encourage vendors to explain what sets their technology apart – proprietary innovations, patented approaches, or unique deployment models.
- **Scalability and flexibility considerations**
Require vendors to detail how the solution can adapt to growth, SKU expansion, or shifting order profiles.
- **Safety compliance certifications**
Request confirmation that all proposed equipment complies with applicable OSHA, RIA, ANSI, and NFPA safety standards.
- **Preferred technology partners**
If you plan to buy through a system integrator, specify any preferred vendors or technologies you'd like included in their proposal.

6. Implementation Approach

- **Typical deployment timeline**
Request realistic deployment milestones, from contract signing through go-live, so you can plan internal resources accordingly.
- **Integration strategy with existing systems (WMS, ERP, etc.)**
Ask vendors to describe how their solution will connect to your existing tech stack, including any customization requirements.
- **Training and change management**
Clarify how vendors will support your workforce through the transition, including training programs, documentation, and on-site support.
- **Change order and issue resolution process**
Request the vendor's standard process for managing scope changes, unforeseen issues, or modifications during implementation.

7. Support & Service

- **Post-installation support model**
Understand the level of ongoing support — is it 24/7, on-call, remote, or on-site?

- **Maintenance and service level agreements (SLAs)**
Ask for details on preventive maintenance schedules and guaranteed response times for issue resolution.
- **Remote monitoring and troubleshooting capabilities**
Explore whether the vendor offers proactive system monitoring or AI-driven diagnostics to reduce downtime.

8. Cost Structure

- **Detailed breakdown of capital and operational costs**
Request a transparent cost breakdown covering hardware, software, installation, and professional services. Be sure to indicate whether pricing should include estimated taxes, freight/shipping charges, and any applicable duties or tariffs.
- **Optional services and pricing**
Identify add-ons like extended warranties, additional training, or premium support packages and their costs.
- **Warranty and service costs**
Clarify what's covered under warranty and what ongoing service fees you should expect after deployment.
- **Pricing Assumptions and Exclusions**
Ask vendors to clearly state any assumptions or exclusions built into their pricing to avoid surprises during contracting.

9. References and Case Studies

- **Relevant client success stories**
Ask for case studies that demonstrate proven ROI or operational improvements in environments similar to yours.
- **Contactable references in similar industries**
Request references you can speak with or visit, to validate performance claims and implementation experiences.

10. Exceptions, Clarifications, and Alternatives

- **Exceptions and Clarifications to Stated Requirements**
Request any exceptions to your stated requirements, including technical specifications, scope of work, or contractual terms. Vendors can also clarify any points of interpretation to ensure alignment.

- **Alternate Solutions or Pricing Discounts**

If applicable, encourage vendors to outline any alternative solutions or approaches they think would provide additional value beyond the requested scope. Vendors may also outline pricing flexibility options, such as volume discounts, phased implementations, or multi-year agreements.

- **Optional Services and Value-Added Offerings**

Invite vendors to include any optional services or value-added offerings not explicitly requested that could enhance your project outcomes.