

Cramer

Project Portfolio Management Consulting

Request for Proposal

Chris Leonardi
7/20/2010

Contents

Introduction 3

Qualifications 3

Scope of work 3

Format..... 4

Timeline..... 4

Submission 5

Evaluation 5

Confidentiality..... 5

Terms and Conditions of Proposal 5

Introduction

Cramer PCI (<http://www.crameronline.com>) is a digital marketing and events solutions provider with 170 employees and annual revenues of \$25MM.

Cramer PCI manages multiple, concurrent projects of varying complexity across a finite pool of resources. Currently, we use a collection of largely disconnected and manual processes to manage projects, resources, and finances. Impacts to our operational efficiency have become increasingly pronounced as the type, scale, and volume of our engagements evolve.

Cramer PCI is seeking a consultant to develop an RFP for a Project Portfolio Management (PPM) or Multi-Project Management (MPM) system, and lead the vendor selection process.

Qualifications

The consultant should have the following qualifications:

- Experience with management consulting, workflow optimization, and process engineering
- Strong subject matter expertise in PMO competencies, including waterfall and iterative methods
- Strong subject matter expertise in financial management
- Experience working with multiple stakeholders to drive organizational change and adoption, especially in an environment with entrenched habits and loose controls
- Experience working with enterprise-class PPM systems. If the consultant has bias towards a specific PPM system, that bias should be disclosed in their proposal
- Experience working with digital marketing agencies, interactive agencies, and software development firms
- Experience specifying large-scale outsource provider contracts
- Experience managing a vendor selection process
- Experience integrating with or migrating from Microsoft Dynamics, Microsoft SharePoint, and OpenAir

Scope of work

This engagement is considered the second of a three-phase initiative.

The first phase, already underway, seeks to provide additional intelligence on resourcing and project financials that can't easily be generated today. Data collected by this interim solution will help drive decision-making during the second phase.

The second phase is the subject of this RFP. Its primary goal is to define and plan phase three, when Cramer will implement a broader solution addressing our project, resource, and financial management challenges. Its secondary goal is to refine and optimize methods and process in both the near- and long-term.

The consultant will be responsible for the following Phase 2 tasks and deliverables:

- analyze Cramer’s existing methods and tools
- propose short- and long-term process refinements/optimizations
- review and align ongoing process initiatives with phase three of this initiative
- facilitate requirements elicitation
- mitigate adoption-related risks
- prepare an RFP for the implementation of a PPM system
- conduct vendor evaluations and facilitate vendor presentations
- present a vendor recommendation

Format

The proposal should include the following:

- A demonstrated understanding of Cramer’s needs
- Qualifications appropriate to Cramer’s requirements
- Team organizational structure and roles of supporting personnel
- A schedule of availability
- A description of approach, tasks, deliverables and change management
- Proposed budget, including hourly or project rates, estimated hours, and estimated additional expenses
- Disclosure of any conflicts of interests of team members, and a provision of a plan to manage conflicts
- At least three references

The proposal should not exceed 25 pages. The proposal should be summarized in a one-page cover letter. The summary should include key elements, team members, and proposed time/cost. Additional space may be used for the Consultant teams’ resumes. A sample RFP and publications demonstrating capabilities may also be provided.

Timeline

The timeline below represents Cramer’s estimated schedule for the RFP process:

Activity	Date
RFP released to suppliers	9/9
Suppliers indicate intent to participate in the RFP via email to Chris Leonardi (cleonardi@crameronline.com)	9/15
Questions due on RFP content via email to Chris Leonardi. Questions should be submitted in a clear format, preferably at one time. Where appropriate, answers to supplier questions will be distributed to all RFP recipients to ensure equity within this process.	9/21
Proposal due via emailed PDF to Chris Leonardi	9/27
Communication of decision to Suppliers	10/7
Project start	10/19

Submission

Your proposal and company profile should be submitted as a PDF via email on or before September 5th to Chris Leonardi, VP/Technology at cleonardi@crameronline.com.

Evaluation

The consultant will be selected at the discretion of Cramer's executive committee. Candidates will be expected to demonstrate their qualifications and credentials. Additionally, candidates will be evaluated against the following selection criteria:

- Depth/breadth of understanding of Cramer's industry
- Depth/breadth of knowledge in PPM space
- Ability to achieve deliverables within the timeframe
 - Realistic schedule of events, meetings and process for achieving deliverables
 - Confidence in ability to provide a high-quality RFP and other deliverables in the required timeframe
- Ability to work in a collaborative fashion with Cramer participants and stakeholders
- Confidence in ability to provide Cramer a balanced assessment of risks and opportunities

Confidentiality

This document contains information proprietary to Cramer; all information contained here (or accumulated through other written or verbal communication), as well as all information about this process as a whole is considered strictly confidential and should be used solely for the purpose of providing a response to this document as specifically requested. Any other use of this information, including but not limited to the disclosure or release of this information to outside persons or organizations, without the written authorization from Cramer is strictly prohibited. Cramer will hold responses to this request in strict confidence.

Terms and Conditions of Proposal

Cramer shall not be bound to accept the lowest priced proposal nor any proposal. The consultant must include in their response a statement that, subject to award of contract, each team member of consultant used in the performance of this assignment has no conflict of interest and that each such team member will not work on the same or any substantially similar services for a competing firm during the course of performing this assignment or for a period of three (3) months thereafter.

Expenses incurred in the preparation of proposals in response to this RFP are the vendor's sole responsibility. The pricing, terms, and conditions stated in your proposal must remain valid for 1 year from the date of delivery of the proposal to Cramer.

Cramer reserves the right to amend, modify or terminate this RFP at its sole discretion.

Proprietary and Confidential

Absolutely no announcements regarding this RFP are permitted without prior approval of Cramer.

Any Purchase Order awarded as a result of this RFP process will be in accordance with the terms and conditions of a Master Services Agreement (MSA) between Cramer and the winning vendor.