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Response to Request for Proposals in IT Industry: Critical Success Factors

Abstract

IT firms respond very competitively to requests for proposals (RFP). The mechanism of response to globally floated RFPs and the factors which make a winning response to RFPs are understated in the literature. This paper uses discriminant analysis to identify the three most important parameters which have the highest impact on the success or failure of any response to RFP. The findings of this research can be used to structure the sales strategy and response to RFPs of IT companies, and also for the training of sales staff.

Information Technology (IT) need-procurement and implementation are generally expensive[1], involve strategic planning and fund allocation, and have strategic consequences. IT procurement is different from a classic product acquisition—the stages and also the post procurement protocols are different. In the IT industry the process of selling starts with the interactions with various clients and the assessment of their IT needs. This stage is often considered crucial as it becomes the basis for the need architecture and development of a request for proposals (RFP). IT companies differ from manufacturing organisations in many ways, especially in the degree of customisation required for the goods and services provided to the clients. This is where response to RFP plays a crucial role. Unlike manufacturing where the needs of the clients are listed, in IT there are innumerable tacit needs of an organisation or department which the vendors seek to address. Customisation is the most important differentiator in the IT industry; making the products and services fit the needs of the clients, and projecting the same is a very critical activity for the success of an IT firm.

Literature Review

An IT solution is generally very costly, and it is purchased only after extensive needs assessment of the organisation. After the need

assessment a company generally prepares a project brief with key deliverables and time lines, and then invites various IT companies through a request for proposals. Several researchers have detailed the process of procurement and implementation of IT services and its key components[2]. A typical IT service procurement starts with a request for information (RFI), followed by an RFP and pilot demonstration, and then come the negotiation, procurement and implementation stages. From an IT services perspective, RFP is an essential part of the sales function in the IT sector[3]—the award of the IT service contract and the development of the solution are based on the RFP, and it has taken centre stage in the sales function of all IT firms. The box below summarises the process of generating an RFP and a response to one.

RFP procedures—and simultaneously, the sales function of the IT firm—start with the needs assessment of the client company, which results in a brief of the activities of the company. Greenbaum[4] and Verville and Halingten[5] have detailed the six stage model of the buying process for enterprise resource planning (ERP) software. The six stage model starts with information search. At this stage the sales staff of the IT company can be of help to their prospective clients in the identification of various IT needs, depending on the sector (such as banks, FMCG companies, education institutes, and so on) to which the clients belong. The information search will be based on the need assessment, and this will become the basis for the development of the RFP document, which is the central focal element for the contract. Project definition and early pre development activities in any project are vital for the success of the project[6]. In the IT service industry, early pre development activities consist of the response to RFP. IT companies' response to RFP and subsequent sales are different from product sales in that a typical product sale is a one time transaction and the

Request for Proposal (RFP)

Generating an RFP

Generally companies or organisations conduct a need assessment of their IT requirements. This need analysis of various IT solutions is done in-house as well as through consultants. The need assessment coupled with the overall strategy focus of the company leads to the generation of a request for proposals (RFP). An RFP is an invitation to various IT companies to apply with possible solutions to the company's needs. The questions that are typically asked in an RFP are as follows:

- How long has your company been in business?
- Provide a summary of the financial profile of your company, including your most recent annual report or audited statements.
- How many customers do you have? How many are Fortune 500? How many new customers were added last year?
- Who is your primary contact (name, title, telephone number, email address) for additional questions that we may have?
- Please provide a complete profile of your company (products and services).
- How many clients of comparable size to this customer do you currently provide software development outsourcing services to?
- How many clients are end-to-end outsourcing clients in this area?
- Is there any recent, current or pending litigation against your company which may impact on your outsourcing business or the structure of your company or affect your relationship with your strategic partners?
- What differentiates your company from other suppliers in the area of application development?
- Explain your coordination and experience with interfacing with other vendor's products.
- How do you manage this coordination?

How IT Firms Respond to RFPs

In responding to RFPs, IT firms go through the following processes:

Appraisal: The project deliverables are key points for appraisal and become the basis for successful response to the RFP. This will lead to the identification of key deliverables and it will help in the viability analysis of the project.

Constituting an RFP Team: After need assessment on the basis of appraisal of key deliverables, an interdisciplinary team has to be created.

Response Preparation: The final response tries to address all the queries of the RFP and seeks to maintain uniformity of technical terms.

Presentation: A formal presentation may be required at the time of evaluation by the client so as to better understand the response to RFP.

Selection Process

After the RFPs are floated, the responses are shortlisted by the initiating company and evaluated on the basis of various factors. A final selection is done based on the time and price quoted.

involvement of the customer is limited, whereas in the sale of IT services there are multiple transaction points which require constant and continuous after sales involvement.

According to Geisler and Hoang[7], whose study focused on the purchase of IT solutions by service companies, most of the extant literature does not stem from research studies and is prescriptive in nature; a lack of research to determine the critical parameters which would contribute to a successful response to RFP was also noted. This paper aims to fulfil this research gap by attempting to determine the critical success factors in response to RFPs for IT firms.

Research Objectives, Design, and Methodology

The research objective of this study can be subdivided into three: (1) identification of important parameters in response to RFPs in IT companies; (2) classification of the parameters based on their relative impact; and (3) comparative analysis of various scenarios using the parameters identified in (1) above.

In formulating the research design, the important parameters in response to RFPs in IT companies were identified through exploratory research. Questionnaires and telephonic interviews with industry experts (namely sales managers) were used to identify the important factors that form part of the response to RFPs.

The classification of the parameters based on their relative impact was achieved through discriminant analysis. Industry experts were asked to fill up a data sheet based on the various factors identified, and discriminant analysis was used on the scores of the different factors to identify the more important parameters.

Scenario building was used to arrive at the various scenarios possible among the factors that were determined through the exploratory research.

Based on the parameters arrived at by this process, a data sheet was developed for analysing the successful responses to RFPs and the failed ones, and data was collected from the participating IT firms. In the data sheet, the relative scores for different parameters for projects that these firms had tried for (by responding to the RFPs of prospective clients) were collected. These were put under two categories:

Failed response: Here the scores of the parameters relative to the company which finally got the contract were obtained.

Successful response: Here the scores for the parameters relative to the next best company in the process were obtained.

Based on these scores, a qualitative and quantitative analysis was done to arrive at the results.

Parameters in Response to RFPs in Sales

Based on the feedback collected from the industry experts through the questionnaire and telephonic interviews, thirteen factors were identified of which ten were retained for the purposes of this study, and three were removed. Exhibit 1 lists the 10 parameters which were considered for quantitative data collection along with their area of coverage.

Exhibit 1 Parameters in Response to RFPs Used for Data Collection

Parameters	Coverage
Technical (TECH)	Technical expertise and infrastructure offered
Financial (FIN)	Bid amount/billing system
Proposed solution (SOLN)	Proposed technical solution for the project
Delivery strategy (DEL_STR)	Overall delivery strategy for the project
Delivery schedule (DEL_SCH)	Timelines of delivery of different parts of the project
Manpower planning (MAN_PLAN)	Manpower allocation and onsite/offshore ratios
Previous record (PRE_REC)	Previous experience of working in similar projects/previous record of working with the client
Perceived quality (PER_QUAL)	Quality certifications in that domain
Cultural aspects (CUL_ASP)	Knowledge of local culture
Others	Other information specifically requested by the client

The three parameters that were removed from the list were:

Current scenario: This parameter is important only in a few cases of incremental work and projects which are not purely developmental. Since all clients today make the current scenario available to vendors (even for maintenance and incremental works), the understanding of this factor is quite identical for most vendors.

Assumptions: Earlier, this factor was very important in determining the best proposal, but with the maturing of most systems, and the technical and analytical competency of IT companies today, it is no longer crucial. Assumptions are now discussed in detail once the winners in the proposal selection process have been decided.

Reward/penalty clauses: Earlier, only a few vendors were open to the penalty and reward clauses, which made it an important parameter in the selection of the best proposal. But with the willingness of all vendors to accept these clauses, its importance has diminished significantly.

Sampling

The sampling procedure used was judgmental because response to RFPs is a niche term and only those from the industry with relevant experience would be able to understand the research objectives and provide relevant data. The following criteria were used to narrow down the list of pre sales managers selected for the project: at least two years of work experience or participation in at least 30 responses to RFPs to possess a thorough knowledge of the strengths and weaknesses of their competitors; and membership of teams which have won as well as lost at least five contract bids each in the last one year. The latter criterion was to ensure that their experience covered a gamut of geographies, verticals and clients. Also, since the responses to RFPs were made within the last one year, it would be easier to recollect and provide accurate data.

The next step was to identify five experts working in top Indian IT firms—the parameters used for this research were decided based on their responses to the questionnaire and telephonic interviews. The sample size that was initially targeted was 50 responses to RFPs. To get a balanced perspective, the research required a total of 25 samples each for successful and failed responses to RFPs. The number of samples provided by the five experts differed depending on the number they had worked on in the last one year. Also, it was observed that the number of failed attempts was considerably larger than the number of successful ones. Those proposals which won the contract were deemed successful responses to RFPs, and those which failed to win the contract were treated as failed responses to RFPs.

This sampling could be considered an instance of stratified random sampling. 'Successful' and 'failed' were the two strata and within these, the sampling was random, the only constraint being the timeline—the past one year. Exhibit 2 shows that the distribution of the samples collected from each firm is almost evenly spread out among the five firms, and also between the number of successful and failed proposals. For any given firm, the percentage of successful proposals ranged from 17%–25%. Therefore, it was considerably easier to get data for failed proposals as compared to the successful ones.

Primary Data Sheet

Based on the ten parameters identified through the questionnaire and telephonic interviews with the experts, a data sheet was formulated. The scoring of the parameters was based on a 5 point Likert scale (1 = significantly inferior; 2 = marginally inferior; 3 = at par; 4 = marginally superior; and 5 = significantly inferior).

The scoring of successful proposals was relative to the next best proposal which lost out. This was to ensure we captured the importance of those parameters which tilted the balance in favour of the winning proposal.

The scoring for failed proposals was relative to the

Exhibit 2 Distribution of Samples for Successful and Failed Response to RFPs

	Response Data		
Firm	Successful	Failed	Total Number
I	4 (17%)	6 (22%)	10
S	4 (17%)	5 (19%)	9
H	5 (22%)	6 (22%)	11
T	5 (22%)	4 (15%)	9
C	5 (22%)	6 (22%)	11
Grand Total	23	27	50

Exhibit 3 Relative Scoring on 10 Parameters for Successful Proposals

		Parameter									
Firm	Project Name	Technical	Financial	Proposed Solution	Delivery Strategy	Delivery Schedule	Man Power Planning	Previous Record	Perceived Quality	Cultural Aspects	Others
H	HA	4	4	3	4	3	3	3	4	3	NA
H	HB	3	4	4	3	4	3	2	4	3	NA
H	HC	5	4	3	3	3	3	3	4	2	NA
H	HD	3	5	3	3	3	2	2	3	2	NA
H	HE	4	4	3	4	2	2	2	3	3	NA
S	SA	4	2	4	4	4	4	4	4	2	NA
S	SB	4	4	3	3	3	3	3	4	3	NA
S	SC	3	3	2	3	3	3	3	4	5	NA
S	SD	3	3	3	3	2	3	3	3	5	NA
I	IA	5	5	4	5	5	5	3	4	3	NA
I	IB	3	4	4	5	4	3	3	4	2	NA
I	IC	5	5	5	3	3	3	2	4	3	3
I	ID	5	5	3	4	3	3	3	4	3	3
T	TA	4	3	3	3	3	3	2	3	3	NA
T	TB	3	4	3	3	3	2	3	3	3	4
T	TC	5	3	4	4	3	3	2	3	3	NA
T	TD	4	4	3	2	2	3	2	3	3	NA
T	TE	4	3	3	4	4	2	3	3	2	NA
C	CA	4	5	4	5	3	4	3	4	3	NA
C	CB	4	3	3	3	4	3	3	5	4	NA
C	CD	3	4	3	4	3	2	4	3	3	NA
C	CE	4	3	4	3	3	3	2	3	3	NA
C	CF	4	4	2	4	3	3	2	3	2	NA

successful proposal. This was to ensure that the performance of a failed proposal compared to the best; it also helped to get an insight into what was lacking in the proposal.

Based on the scores, both qualitative and quantitative analysis was done to infer results.

Exhibit 3 shows the consolidated data of all 23 successful proposals with relative scoring on the ten parameters. The scoring is relative to the bid which came in second (according to the respondent).

Exhibit 4 shows the consolidated data of all 27 failed proposals with relative scoring on the ten parameters. The scoring is relative to the bid which eventually won the contract.

Analysis of Quantitative Data

The analysis of the data had to be done by a process which would take the interrelationship of the variables into account, as well as their impact on the success or failure of the proposal based on the relative performance

Exhibit 4 Relative Scoring on 10 Parameters for Failed Proposals

		Parameter									
Company	Project Name	Technical	Financial	Proposed Solution	Delivery Strategy	Delivery Schedule	Man Power Planning	Previous Record	Perceived Quality	Cultural Aspects	Others
H	HF	2	2	3	3	3	3	4	3	3	NA
H	HG	2	3	3	2	3	3	3	3	3	NA
H	HI	2	2	3	3	3	4	3	2	3	NA
H	HJ	2	3	3	3	4	3	3	3	3	NA
H	HK	2	3	2	3	2	3	2	3	2	NA
H	HL	4	2	3	2	4	4	3	2	2	NA
S	SE	3	1	2	4	3	3	4	3	3	NA
S	SF	2	1	4	3	3	3	4	3	3	NA
S	SG	4	2	3	3	2	2	3	2	3	NA
S	SH	3	2	4	3	3	2	4	4	3	NA
S	SI	3	2	3	2	3	2	4	3	3	4
I	IE	4	5	2	3	3	3	2	4	1	NA
I	IF	4	2	4	2	4	2	3	3	4	3
I	IG	2	2	3	2	2	2	2	3	3	NA
I	IH	2	4	4	4	5	4	3	3	3	NA
I	IK	4	2	3	4	4	3	3	4	4	4
I	IL	2	3	4	2	3	4	4	3	3	NA
T	TF	3	2	3	3	4	2	3	3	3	NA
T	TG	2	3	4	3	4	3	2	3	3	NA
T	TH	3	2	3	2	3	2	3	3	3	NA
T	TI	2	2	4	3	3	4	4	2	3	NA
C	CG	1	3	2	3	3	3	2	3	3	NA
C	CH	3	3	3	3	3	4	4	2	4	NA
C	CI	3	2	2	3	4	3	4	3	3	3
C	CJ	2	3	3	2	4	3	4	2	3	NA
C	CK	2	2	2	4	3	4	3	3	4	3
C	CL	3	3	4	2	3	3	3	2	3	NA

of one compared to the other. To provide for this, discriminant analysis was used, which essentially determines which variables are the best predictors of a group membership. Discriminant analysis determines which groups differ with respect to means of a variable to predict new cases of group membership.

Success value was taken as 1 and failure as 0 when data was fed into the Statistical Package for Social Sciences (SPSS) tool. As the response to the parameter 'Others' was 'Not Applicable' in the majority of the cases, the final analysis was conducted on the remaining nine parameters for which complete data was available. (Tables showing

output of discriminant analysis are available on request.)

Analysis

All the 50 cases studied were found to be valid for discriminant analysis—there were no instances of missing/out-of-range group codes; no instance of at least one missing discriminating variable; and no instances of both missing/out-of-range group codes and at least one missing discriminating variable. Exhibit 5 details the group statistics on all nine parameters for the 23 successful and 27 failed proposals.

The Box M test—which tests the null hypothesis of equal population covariance matrices—shows the significance level to be 0.242, which shows that in this situation, the test is fine.

The Eigen value (2.026; canonical correlation = 0.818) and the Wilk's Lambda value (0.331; significance = 0.000) also show the validity of the output.

Standardised canonical discriminant function values (Exhibit 6) show that the variables Technical, Financial, and Delivery Strategy have the highest values (0.553, 0.616 and 0.445 respectively). The values in the function of the other variables are either low or negative. This clearly shows that these three parameters are the most important determinants in the success or failure of a proposal. The values of the parameters Perceived Quality (0.242), Cultural Aspects (0.292) and Proposed Solution (0.158) are important but not significant when compared to the earlier three. The values of the parameters Manpower Planning (-0.202), Delivery Schedule (-0.309) and Previous Record (-0.089) are negative and can be considered comparatively unimportant. One possible conclusion is that these parameters fulfil the expected requirements and a certain level of performance in them is taken for granted in any proposal.

Exhibit 5 Group Statistics on Nine Parameters for Successful and Failed Proposals

				Valid N (listwise)	
Result	Parameter	Mean	Std Deviation	Un weighted	Weighted
.00	TECH	2.6296	.8389	27	27.000
	FIN	2.4444	.8389	27	27.000
	SOLN	3.0741	.7299	27	27.000
	DEL_STR	2.8148	.6815	27	27.000
	DEL_SCH	3.2593	.7121	27	27.000
	MAN_PLAN	3.0000	.7338	27	27.000
	PRE_REC	3.1852	.7357	27	27.000
	PER_QUAL	2.8519	.6015	27	27.000
	CUL_ASP	3.0000	.6202	27	27.000
1.00	TECH	3.9130	.7332	23	23.000
	FIN	3.8261	.8341	23	23.000
	SOLN	3.3043	.7029	23	23.000
	DEL_STR	3.5652	.7878	23	23.000
	DEL_SCH	3.1739	.7168	23	23.000
	MAN_PLAN	2.9565	.7057	23	23.000
	PRE_REC	2.6957	.6350	23	23.000
	PER_QUAL	3.5652	.5898	23	23.000
	CUL_ASP	2.9565	.8245	23	23.000
Total	TECH	3.2200	1.0160	50	50.000
	FIN	3.0800	1.0850	50	50.000
	SOLN	3.1800	.7197	50	50.000
	DEL_STR	3.1600	.8172	50	50.000
	DEL_SCH	3.2200	.7083	50	50.000
	MAN_PLAN	2.9800	.7140	50	50.000
	PRE_REC	2.9600	.7273	50	50.000
	PER_QUAL	3.1800	.6908	50	50.000
	CUL_ASP	2.9800	.7140	50	50.000

Qualitative Analysis

The qualitative analysis is based on the following observations which were taken from both the successful and the failed proposals.

Exhibit 6 Standardised Canonical Discriminant Function Coefficients

Parameter	Function 1
TECH	0.553
FIN	0.616
SOLN	0.158
DEL_STR	0.445
DEL_SCH	-.309
MAN_PLAN	-0.202
PRE_REC	-0.089
PER_QUAL	0.242
CUL_ASP	0.292

Successful Proposals

For the parameters Technical and Perceived Quality, none of the 23 proposals were rated at 2 or below; i e, none of them were marginally or significantly inferior to the next best proposal in technical aspects or the perceived quality of the firm. For the parameters Financial, and Delivery Strategy, only one proposal each was rated 2. All the other proposals were rated 3 or above; i e, at par or marginally better or significantly better than the next best proposal. A few proposals for the parameters Proposed Solution and Delivery Schedule were rated 2. Manpower Planning, Previous Record and Cultural Aspects have considerably more scores of 2 compared to the other parameters.

Failed Proposals

The parameters Technical, Financial, Delivery Strategy and Perceived Quality had the maximum number of proposals with scores of 1 and 2. The parameters Delivery Schedule and Previous Record had the highest number of proposals with scores of 4 and above.

Scenario Analysis

A scenario is the description of a future situation together with the sequence of events leading from the present situation to the future situation. Saxena et al[8] state that in a scenario analysis, the actors, their alliances and conflicts, and also the environment factors have to be identified. For our purposes, the actors are the IT firms (pre sales team, delivery managers, finance group, human resource managers, administration etc), the clients, the rival IT firms and the quality accrediting organisations. The alliances are between the IT firms and their clients, and the conflicts are between the IT firms and their rivals. Market conditions (economy outlook, sector outlook, political conditions, legal framework etc) form the environmental factors.

Based on the data collected for this research work, the following possible scenarios were analysed.

Scenario A

When the parameters Technical, Financial, Delivery Strategy have all been rated 3 and above, we envisage:

Case 1: When at least one of the three parameters have been rated 4.

Out of 17 such instances, all went on to win the contracts.

Case 2: When all three parameters have been rated at 3.

Out of three such instances, two were successful and one unsuccessful; both successful attempts had the highest score of 5 (in Cultural Aspects).

Case 3: When two of the three parameters have been rated 4 or above.

Out of 17 such instances, all were successful.

Case 4: When all three parameters have been rated 4 and above.

Out of six such instances, all were successful

Analysis

Based on the four possible cases outlined in Scenario A, it can be concluded that a firm's performance in these parameters—even if only marginally better than that of its rivals—can contribute substantially to the successful landing of the deal (even though its performance in the other parameters may be at par or even marginally inferior to that of its rivals). The firm's performance in the other parameters becomes crucial only when the scores in all these three are at par with the scores of its rivals.

Scenario B

When at least two of the parameters Technical, Financial and Delivery Strategy have been rated below 3, we envisage:

Case 1: When just one parameter has been rated 3.

Out of 13 such instances, all were unsuccessful attempts.

Case 2: When all parameters have been rated below 3.

There was one such instance, which was a failure.

Analysis

Based on the two cases outlined above, it can be deduced that these three parameters are critical, and underperformance in them in comparison to the rival firms would guarantee failure. Multiple instances exist where marginally superior or even significantly superior scores in other parameters have not been able to generate successful proposals if a firm's performance in these three parameters was below par.

Scenario C

Standalone cases where a single parameter has extreme ratings (either 1 or 5) while the scores of the other

parameters are at par or in the vicinity of the same.

Case 1: Cultural Aspects rated at either 1 or 5.

There were two instances of Cultural Aspects rated at 5—both were successful.

There was one instance of Cultural Aspects rated at 1, which was unsuccessful.

Case 2: Extreme ratings of other parameters (Proposed Solution, Delivery Schedule, Manpower Planning, Previous Record and Perceived Quality) on a standalone basis, when the scores of the other parameters are at par or in the vicinity of the same.

There was one such instance—Delivery Schedule rated at 5—which was unsuccessful.

Analysis

For extreme ratings of a single parameter (with at par or close ratings for the other parameters), only Cultural Aspects plays a deciding role. Delivery Schedule had one extreme score in this case which did not affect the result. The other parameters do not have any extreme score in this scenario, and hence it can be inferred that they do not have any impact on a standalone basis unlike Cultural Aspects. Further investigation with the industry experts who had provided the data for this research revealed that these projects were for clients in countries which had a significant cultural block with respect to other countries, and a language block with respect to English.

Conclusions and Recommendations

The results of the data analysis lead us to arrive at certain interesting conclusions. Companies are now opening up to new vendors more than ever before, which is clearly shown by the fact that Previous Record does not play a significant role in landing new contracts. Perceived Quality plays a major role, though it is not a decisive factor. The clients' preference for vendors with certifications like ISO, BS 7799, BS 15000 and domain specific certifications is an added advantage to the bidders.

Technical, Financial and Delivery Strategy are the most critical parameters in making the winning proposal, and together they outweigh mediocrity or inferiority in other parameters. Cultural Aspects plays an important role, though only in select geographies. In three cases, it was the deciding factor in the award of the contract. Proposed Solution and Manpower Planning are the parameters which have been rated very close to 3. It can be inferred that the competencies of IT firms are very close to each other in these parameters.

Both the qualitative and the quantitative analysis have shown that among all the parameters considered in this research, clients have a definite preference for excellence in three parameters namely Technical, Financial and Delivery Strategy. A technically superior, financially viable proposal with a better delivery strategy compared to those of its peers is almost guaranteed to win a contract for an IT vendor. The results of our analysis suggest that IT firms would need to devote more importance and time to these three parameters if they wish to increase their chances of a successful bid. Firms attempting to establish a foothold in select geographies where the parameter of Cultural Aspects plays a deciding role would need to focus on this vital parameter.

The telephonic and personal interviews that were conducted with the sales managers of five Indian IT companies revealed that none of them have any documented modules or training material for RFP based sales; although sales and marketing teams have a formal training process and documented training material, managers are expected to learn about RFP on the job.

This is an area of major concern as considerable knowledge loss is expected during transition which invariably happens during personal transference rather than through documentation. Though all companies have 'lessons learnt' and 'best practices' documented, they are spread across multiple forums and databases, and their integration into one document for use by new employees in sales training hasn't been achieved yet. Also, due to increasing attrition rates and the frequent shifting of managers between delivery projects and sales, it becomes imperative for the companies to conceive and establish a training material repository dedicated only to sales (especially dealing with RFPs) to prevent loss of valuable information. This constitutes an important area for future research. The creation of documented training material would be very beneficial for IT firms both in the short and the long run.

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