



NTT DATA ServiceNow Resource Kit

Digital Transformation

RFP Template

As the 8th largest IT services provider in the world and a ServiceNow Elite Partner, NTT DATA has responded to and won thousands of RFPs over the years.

Over the past six years, we've seen RFPs shift from tactical ServiceNow implementations to massive Digital Transformation catalysts. And over the past 6 months, we've seen organizations across industries expand, decrease, or simply reprioritize their technology spend and Digital Transformation roadmaps in light of the unusual changes brought on by 2020.

The exercise of writing RFP questions and reviewing potential vendor answers is no longer about simply searching for a vendor to help you implement the technology, but about finding a partner who understands your organization's overall strategic vision and is nimble enough to readjust according to your organization's shifting needs.

Use the following template to build world-class RFPs that will help you find a partnership that will advance your Digital Transformation Strategy, regardless of your starting point.

RFP Template

1.0 Introduction

1.1 Company Overview

Provide a brief overview of your company for Vendors. This introduction should include relevant information like your mission statement and notes on your company culture so that Vendors can get a better sense of your organization, its structure, and its values. Before you finalize the writeup, confirm that it addresses the following:

- Company background
- Your digital business initiatives and why they matter for your business
- Guiding principles for your organization – *in other words, what key drivers are important: simplicity, collaboration, culture, continuous improvement?*

1.2 Self-Assessment

Before embarking on your ServiceNow journey, it's important to assess where you stand. Thinking about the reality of your organization's digital footprint will give you a concrete foundation from which you can build your strategic vision. Consider questions like:

- Do you struggle to define a digital roadmap?
- Are you currently tracking any transformation KPIs or metrics?
- Are you not sure which strategy will drive real change in your organization?
- Do you know transformation needs to happen, but struggle to secure budget and support?
- What do you feel would be the biggest risk of failing to digitally transform right now?

While these questions help to define your organization's readiness for Digital Transformation, it's important to remember not to become overwhelmed if you struggle to pin down a clear self-assessment. You may consider issuing a separate RFP for help assessing your current state or including questions about Digital Transformation Advisory services Vendors may offer.

1.3 Strategic Vision

Here is where you define your overall vision for ServiceNow within your organization. A clearly defined strategic vision is crucial to completing a successful ServiceNow project with a phased approach. Focus less on specific products and more on the overarching business outcomes you want to achieve. Clearly state what processes, features, and functionality are in scope for the Vendor and which are not.

Key Questions to Consider:

- What is the current digital structure of your organization?
 - What is the current support model?
 - Are roles and processes standardized across regions?
 - Is it a sustainable model?

- How do you envision the future of your digital footprint?
- What challenges are slowing you down?
- Why are you seeking a partner at this time?
 - What will their role be throughout the implementation?
 - What characteristics are you looking for in a partner? (e.g. relevant implementation experience, high certification counts, internal culture alignment)

Digital Transformation Vision

- What does Digital Transformation mean to you?
- Is ServiceNow being used to drive enterprise-wide Digital Transformation or will it be concentrated in a single business unit (HR, IT, etc.)?
- What is your ultimate goal for the project? Common examples include:
 - Elevating the Employee Experience with a unified Service Portal that provides a better, more intuitive experience
 - Streamlining internal operations by automating manual processes and standardizing them into one system of engagement to better track KPIs and promote top-down visibility
 - Elevating the Customer Experience by providing state-of-the-art digital solutions and an omnichannel experience

Mapping out a vision statement with guiding principles and desired milestones and outcomes helps to align project teams from the get-go. Use the chart below to identify and define your project's guiding principles. An example has been filled out for you.

Vision Statement			
<i>We aim to provide a consumer-grade service to empower our employees to find what they need – whenever, wherever.</i>			
Guiding Principles			
	<i>Simple</i>	<i>Scalable</i>	<i>Empowering</i>
Attributes	<i>"One Stop Shop" for all employees to find what they need.</i>	<i>Solution must be flexible and scalable to our business' and employees' changing needs.</i>	<i>Solution must empower employees to find exactly what they need.</i>
Measures & Milestones	<i>One entry point for employees via Employee Service Portal.</i>	<i>Frequent and regular enhancements to our technical solution and processes.</i>	<i>Employees able to answer their own questions via a robust knowledgebase.</i>

1.4 Project Timeline

Once you have your vision statement complete, it's time to start thinking about a calendar. The next step is to break down your project timeline into clear actions and due dates for vendors to follow. Here is an example of a project timeline:

Action	Due Date (Example)
RFP Issued to ServiceNow Consultants	January 1, 2023
Acknowledge RFP and intent to submit a response to employee@company.com	January 4, 2023
Submit questions to employee@company.com	January 14, 2023
Answers to questions due	January 21, 2023
RFP Submission Due	January 28, 2023
Complete RFP Evaluation and Announce 2-3 Finalists	January 26, 2023
Oral Presentations (Onsite or Remote)	February 4, 2023
Check References	February 8, 2023
Complete Overall Evaluation	February 12, 2023
ServiceNow Consultancy Selected	February 15, 2023

When organizing your project timeline, make sure to include any set project target dates for each release, along with any other factors or time limitations that vendors should consider in their proposals.

1.5 RFP Question and Answer Process

Allow Vendors to ask questions regarding your RFP. This ensures they can create a specific project plan catered to your organization's specific needs.

Outline the process they should follow and set a due date for them to send their questions to: employee@company.com.

2.0 Current Landscape

Here you should give Vendors a clear understanding of your current Service Management landscape, including what technology and platform you're currently using.

2.1 Service Management Environment

- What is your current ServiceNow status?
 - Are you currently on the platform?
 - What other ServiceNow products are in use?
 - What licensing do you have?
- What release of the platform will development take place in?
- Do you have a defined set of KPIs?

2.2 Other Applications and Systems Currently Used

- What current systems or legacy data are you using? Add descriptions of the systems or applications, if necessary.
 - Are you trying to retain or retire those systems?
 - Do these systems need to integrate with ServiceNow? If yes, provide a brief description of the
 - Are you trying to replace anything with ServiceNow? If so, what?

2.3 Future Landscape

- Describe the Service Management landscape you envision for your company post-project.
 - What does tomorrow look like for you?
 - What processes will be affected?

3.0 Solution Requirements

3.1 Systems and Integrations

- What current systems or legacy data are you currently using?
 - Are you trying to retain or retire those?
 - Are you trying to replace anything with ServiceNow?
- Add descriptions of the systems or applications if necessary.

3.2 Project Management

- Is your organization open to following the Partner's project management approach?
- Are there certain must-have phases, meetings and/or deliverables that should be included in the Partner's response?

3.2 Governance Framework

Describe your organization's current governance framework. Be sure to define standards and policies and identify owners of key responsibilities.

- How will you approach training and knowledge transfer?
- Have you defined an OCM strategy? How will you go about implementing it and ensuring roles are clearly defined?
- Do you have a platform support team?
 - How many people will be supporting the platform post-project?
 - What is their experience with the platform?
 - Do they have any ServiceNow Certs?
- What level of support will be needed from the Vendor post-implementation?

4.0 Implementation Approach and Evaluation Criteria

4.1 Your Company's Implementation Approach

- What is your preferred implementation approach?
- Do you want to roll-out in multiple phases?
- Do you want to roll-out by business unit or region versus company-wide?
- Define your priorities for the implementation: what is need-to-have and what is nice-to-have?

Remind vendors to respond to your implementation approach and timeline and suggest an alternative approach if it is not feasible.

4.2 Evaluation Criteria

Clearly outline your evaluation criteria for selecting a ServiceNow partner. Think about questions surrounding:

- *Depth and breadth of the Vendor's ServiceNow practice*
 - How many Certs do they have across the platform?
 - Do they have established thought leadership?
- *Industry experience*
 - Do they have Case Studies and references from clients in a relevant industry?
- *Methodology*
 - Does the Vendor have a defined implementation approach?
 - Do they have experience with OCM?

State that the vendors' responses should address their competency and qualification for each criterion. See the sample evaluation table below and create one unique to your own needs.

Qualification	Weighted Percentage	Standards
Vendor information	X%	• Depth and breadth of ServiceNow practice • What sets that vendor apart from other ServiceNow partners in the ecosystem? • Total number of implementations • Industry Experience • References
Methodology	X%	• Methodology • Governance Model • Organizational Change Management Experience
Delivery Capabilities	X%	• Experience with given key requirements • Implementation approach and timeline • Sample Digital Transformation projects and case studies • On-site or virtual presentation

RFP Quality and Completeness	X%	• Compliance with RFP format • RFP deadline requirements fulfilled • Demonstrate an understanding of your business • Quality of questions asked
Cost	X%	• Services Costs • Ongoing costs

5.0 Your Company's Conditions

5.1 Vendor Representations

Clearly state that vendor representations should be made either verbally or written. The ServiceNow partner's response to your RFP should represent commitments that the consultancy can actually deliver.

6.0 RFP Response Requirements

6.1 Summary Checklist

- Proposal Cover Letter
- Executive Summary
- Proposed Fees and Cost Estimate
- Key Solution Requirements
- Partner Methodology and Implementation Approach
- Staffing
- References

6.2 Proposal Content

Proposal Cover Letter

The cover letter should include a statement certifying the accuracy of all provided information and include the vendors' intent to collaborate with your strategic Digital Transformation initiatives.

Executive Summary

This section should allow vendors to outline their qualifications and their proposed solution for executing your vision. Vendors should describe what sets their consultancy apart from other ServiceNow partners in the ecosystem. What is their unique approach to driving Digital Transformation for their clients?

Additionally, this portion should summarize their implementation approach, proposed phases of implementation, plans for education and roll-out processes, etc.

Proposed Fees and Cost Estimate

Vendors should submit a financial proposal including specific line item details.

Key Solution Requirements

Vendors should detail why their proposed approach and solution best fits your outlined requirements and future business needs. This is a key section of an RFP – if a partner can't justify their proposal's strategic approach then they likely aren't the most qualified consultancy to lead your implementation.

Partner Methodology and Implementation Approach

This section should clearly outline how the vendor will work with you given your RFP requirements and their understanding of your business and strategic vision. Completeness of methodology is important. Here are some questions you may want to ask vendors when selecting a partner:

- How would you approach this implementation?
- How will you assist with leading business process design and thought leadership?
- Where have you seen Digital Transformation efforts fail with other clients? How are you uniquely positioned to avoid those pitfalls?
- State your approach to migration, testing, education, and training.
- How do you **define** your OCM process?

Open-ended questions will help you determine if the responding vendor is the right fit for your organization.

Staffing

The right culture fit will ensure clear communication and project success. Request that vendors describe a specific plan for staffing the implementation. This should include an organizational chart of the project team and brief resumes of each team member.

References

Vendors should submit three references of ServiceNow projects that match your goals, industry, or size within the past three years where the client has undergone meaningful Digital Transformation as a result.