



The background image features a hand holding a pen over a Gantt chart and a project progress table. The Gantt chart shows tasks for four projects (A, B, C, D) with bars representing duration and names like Carey, Franklin, Perry, Alderson, Allen, Barry, Anna, Keith, and Paul. The project progress table lists tasks and their completion percentages.

Project	% Complete
Project A	75%
task#01	100%
task#02	100%
task#03	75%
task#04	25%
Project B	36%
task#05	30%
task#06	25%
Project C	38%
task#07	45%
task#08	25%
Project D	53%
task#09	55%

TIMELINE FOR SUCCESS: MAPPING THE TEM RFP PROCESS

Whether your organization has a current Technology Expense Management (TEM) solution, or you are looking to transition from an in-house solution, knowing the steps to the buying process is critical to a successful and on time implementation.

In this quick guide, we outline a timeline that will help you start the buying process earlier in the contract cycle when issuing a Request for Proposal (RFP) for a TEM vendor.



MONTHS 0-2

EDUCATION

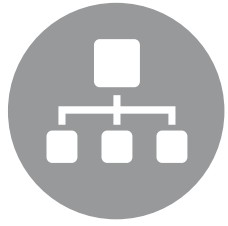
Gather information and start preparing the TEM RFP.

BEGIN BY COMPLETING THE FOLLOWING:

- Clearly define your internal goals, challenges and objectives before starting to write your RFP
- List the business drivers and outcomes you expect from your TEM provider
- Understand your budget cycle
- Understand the timeframe that most RFP processes can take anywhere from six to 12 months
 - What software contracts are in place and when they expire?
 - How much time the team will need to determine which TEM provider is best?
- Highlight what is not working

WHAT YOU CAN EXPECT FROM YOUR TEM VENDOR:

- Access to Knowledge Portal
- Education on common challenges
- An understanding of your goals



MONTHS 2-4

SOLUTION

Submit your RFP to the vendor.

- Outline environment — understand what will be considered “in scope”
- Identify and align decision makers
- Define procurement process
- Define any non-standard requirements and what services will be needed (SaaS vs. BPO)

WHAT YOU CAN EXPECT FROM YOUR TEM VENDOR:

- A detailed proposal with a solution and pricing
- A presented solution to your team



MONTHS 4-6

SELECTION

Once TEM vendors have delivered their proposals, it is time for the selection process.

YOU AND YOUR ENTERPRISE WILL:

- Validate requirements
- Confirm budgets
- Validate procurement process
- Engage legal responses

WHAT YOU CAN EXPECT FROM YOUR TEM VENDOR:

- Delivery of final proof of concept
- Case studies of TEM solutions
- Prepared SOW/MSA



MONTHS 6-10

IMPLEMENTATION

The TEM solution has been agreed upon and contracts have been completed.

THE NEXT STEPS FOR YOUR ENTERPRISE WILL BE:

- Perform requirements gathering activities
- Complete UAT

WHAT YOU CAN EXPECT FROM YOUR TEM VENDOR:

- Delivery of the service and technology requirements
- Alignment of internal teams to your go-live objectives
- Successful implementation of the technology

Have an upcoming RFP that you would like Calero-MDSL to respond to? [Click here.](#)