

PMO Community of Practice November 2018 Meeting Summary

Header (Required)

Title: RFP, SoW and Schedule Templates

Brief description: Leveraging templates to improve effectiveness of writing RFPs, SoWs and Schedules

Learning objectives: Understanding the techniques, practices and benefits of templates to improve effectiveness of writing RFPs, SoWs and Schedules

PDU Amount: 1 PDU

PDU Allocation: Technical

Technical Domains: Business Analysis and Scheduling

Note: Technical PDUs must be within the specific technical domains of: portfolio management, business analysis, agile, risk, and scheduling

Member Discussion Topic 11/13/18: RFP, SoW and Schedule Templates

- Template examples
 - SOW to vendor
 - Application migration
 - Multiple vendors
 - Multiple PMs
- Overall syncing - client/PM
 - One vendor may perform oversight
- Engagement:
 - Initial list of requirements
 - Vendor 1 does this...
 - Vendor 2 does that...
- One template for all:
 - Rules
 - Payment types
 - T&M
 - Timelines
 - Client pre request - create user accounts, site access, etc
 - Time slot for vendor resources
- Vendor templates vs client templates
- Post implementation support
 - “White glove treatment”
- Authoritative vendor:
 - Risks
 - Combinations
 - Pre-evaluations
- Differing expectations of high level risks
 - Know in advance
 - Past artifacts

Next Meeting

Next meeting is Tuesday, December 11, 2018



Participants: *Adella Rosenthal, Cori-Ann Roublick, David Kabat, David Morgen, Ellen Kahan, Jean Juste, John Grazier, John Tsantakis, Marlo Moss, Richard Loeb, Zachary Lehmann*

Chair: David Morgen, PMP
Scribe: Richard Loeb, PMP