## Preparing an EDRMS RFP

Instruction by Bruce Miller IGP, MBA

Duration
8 hours (1 day)

RFP1V

RIMtech Private Online Courses are delivered on-demand to a single organization, with up to 10 participating employees. Content is focused/tailored to your organization, and your particular requirements/interests.

Learn how to prepare an effective RFP (**R**equest **F**or **P**roposal) for an EDRMS (**E**lectronic **R**ecords/**D**ocument **M**anagement **S**ystems) in this course designed and delivered by **Bruce Miller**, author, independent consultant, and leading expert in electronic recordkeeping, and author of "*Managing Records in SharePoint*". Bruce is vendor neutral and has worked with all vendors across his client base. A strong RFP means you'll get the right software and the appropriate accompanying services to meet your requirements, whereas a weak RFP can lead to potential project failure. You'll learn how to write comprehensive requirements that distinguish vendor solutions, conduct effective vendor demonstrations and reference checks, secure adequate knowledge transfer from the vendor, and specify sufficient training, support, and documentation to ensure your project has a successful outcome. Prior completion of any RIMtech EDRMS course would be helpful, but not essential.

Managing Records in
MICROSOFT SHAREPOINT

Bruce Miller
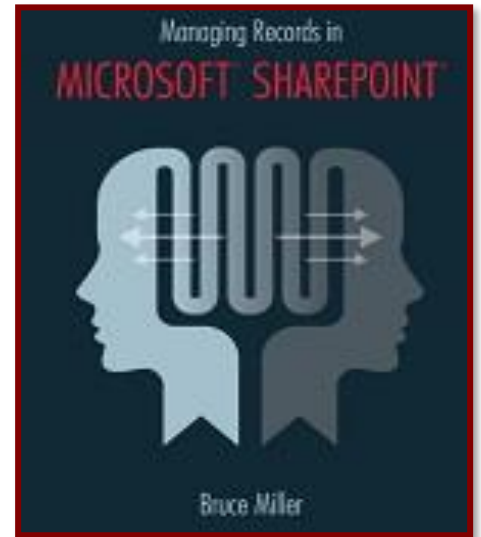
Learning Objectives

Upon completion of this workshop, participants will be able to:

- Define comprehensive EDRMS requirements that differentiate between vendor solutions
- Conduct effective reference interviews
- Specify an effective demonstration that shows you what you need to see
- Structure progress payments against critical progress milestones
- Ensure sufficient training, documentation, and project management services are delivered
- Specify adequate knowledge transfer occurs from the vendor to your organization
- Understand and analyze true project cost
- Clearly define non-billable support services versus billable consulting services

Who Will Benefit

Records/Information Management and IT professionals, procurement professionals, senior management, key project stakeholders.

Takeaway Tools

Participants are supplied with all course materials, including a reusable EDRMS RFP template.

Certification Credits

IGP	14 (ARMAIGP2020_00060)	CRM	7 (2021011126801)

Testimonials

"*I loved the performance measure aspect, and 20 suggested decisions. This was worth the cost of the course alone.*"

"*I really liked the presenter. He engaged the attendees and asked thought-provoking questions that generated some lively conversations.*"

"*This was one of the most engaging and informative seminars I can remember attending. I got a lot of great takeaways and can enthusiastically tell my employer that this was a productive use of my time and training dollars.*"

"*Thank you! This course hit the nail on the head – it touched on many of the issues that I see in the workplace and provided me with the guidance and affirmation that will help me to manage these issues. Awesome seminar!*"

Instructor

Bruce Miller, MBA, IGP is a world leading expert on electronic recordkeeping. He is an independent consultant, an author, and an educator. Widely regarded as the inventor of modern electronic recordkeeping software, he pioneered the world's first commercial electronic recordkeeping software in 1989. In 1997 he achieved the world's first e-Records software certification against the US DoD 5015.2-STD standard, and has since presided over several successful software certifications. In 1999 he developed the world's first e-Records software **engine** for business software. That year he received ARMA Canada's National Capital Region's **Ted Ferrier Award of Excellence** for his contribution to the field of records management. Bruce's software was the first technology in the world to be certified against the revised 5015.2 June 2002 standard. In 2002 his company was acquired by IBM, where he served for three years as IBM's global e-Records Strategy and Business Development Executive. At IBM he was honored as a *Technical Leader*, one of only 439 out of 360,000 IBM employees. Mr. Miller is the recipient of the prestigious 2003 **Emmett Leahy Award**, considered the highest international recognition given to professionals in the field of information and records management. His book "*Managing Records in Microsoft SharePoint 2010*" was an ARMA best seller, and the second edition was released in October 2015. Bruce holds a Diploma in Electronics Engineering Technology, a Masters in Business Administration from Queen's University, and is a certified Information Governance Professional.

Course Topics

Topic	Description
Conducting Vendor Demonstrations	What to ask to see, and how to ensure the vendor shows what you need to see.
Reference Checking	What questions to ask of a vendor's client reference. Get past the highlights and find out the details you'll want to know.
EDRMS Requirements	Don't ask for the features all EDRMS solutions are known to possess. Focus instead on the characteristics that distinguish one from another. Know the important capabilities to seek. Define suitable requirements, with appropriate mandatory vs optional expectations.
Project Deliverable Milestones	Define critical milestones and tie progress payments to validated delivery of each milestone.
Training	Ensure you get sufficient training for your key personnel, and that the training was successfully delivered.
Project Management	How to specify sufficient project management services are brought to bear for a successful outcome.
Knowledge Transfer	Know what knowledge transfer mechanisms to put in place to become self-sufficient as soon as possible.
System Validation	How to specify testing (e.g. User Acceptance Testing) that can validate full system performance against stated requirements and expectations.
Support	Head off the perpetual problem of ambiguity between software support services versus paid consulting services.
Pricing	Avoid the pitfalls of open—ended pricing by understanding how modern EDRMS software is priced. Specify an appropriate pricing model with projections.
Documentation	Overcome notoriously poor documentation by clearly specifying your documentation requirements.

Advantages of RIMtech Online Private Courses

- ✓ Content focused/tailored to your organization only, and your particular requirements/interests
- ✓ 100% vendor neutral content. No ties to products or services providers.
- ✓ Instruction by **Bruce Miller**. Learn from, and interact with, the top expert in electronic recordkeeping.
- ✓ Live instruction – not pre-recorded.
- ✓ Real-world examples and experience from actual projects.
- ✓ The very latest in technology, techniques, and methods.
- ✓ Engaging, dynamic, interactive instruction. Exercises to facilitate learning.
- ✓ You get to keep materials and tools following completion.
- ✓ CRM/IGP credits for most courses.
- ✓ Official Completion Certificate.

Registration Form (1 form per class)			Class	RFP1V
Mr/Ms/Mrs.	Name		Title	
Organization		Dept.		
Address				
City	State/Prov	Zip/PostCode		Country
Telephone	Email			
Payment Method				
Please Bill Credit Card	☐ Visa	☐ Mastercard	☐ Amex	
Name on Card				
Card Number		Expiry Date (YY/MM/DD)		CCV
Signature				
☐ Cheque, Payable to RIMtech Inc.	☐ Invoice, P.O. # (Attach P.O.)			

Five Ways to Register & Pay	
Online	Go to the appropriate class page under Training & Education. Select the class, then pay via PayPal or credit card
Telephone	Call Natalie Arruda at 343-572-8533 to give your credit card details over the phone.
Email	Complete this form and scan it to PDF, then email it to us at natalie@rimtechconsulting.com
Cheque	Complete this form and enclose a cheque. Mail to RIMtech Inc., 50 Argue Drive, Ottawa, On Canada K2E 6S1
Purchase Order	Complete this form, include Purchase Order, scan to PDF, then email to us at natalie@rimtechconsulting.com

Preparing an EDRMS RFP	Maximum Participants		
Price	**3**	**6**	**10**
	US $2,000	US $3,000	US $4,000
Applicable Taxes	Outside Canada		none
	AB, SK, BC, MB, NT, QC, NU, YT		5%
	ON		13%
	NB, NL, NS, PE		15%

Technology Requirements

1. Reliable, stable high-speed Internet connection
2. Computer/laptop with a hands-free microphone (headset, or built-in)
3. Zoom App available at https://**zoom**.us/**download** (downloads automatically upon first meeting sign-in)
4. Camera optional but recommended
5. Printer to print out course exercise materials (highly recommended)

Terms and Conditions

This is a summary only. See https://www.rimtechconsulting.com/terms-conditions for our detailed Terms and Conditions.

1. **Equipment Requirements**. Each participant is responsible for the technology requirements above in order to participate successfully in any RIMtech online class or event.
2. **Class Materials.** Participants will receive all class materials in electronic form. Materials will be posted to a restricted page of RIMtech's website for that particular class.
3. **No-Shows**. If a participant fails to attend a class, RIMtech will make the class materials available for that participant.
4. **Payment**. Payment, or a Purchase Order, must be received by the class date. All invoices are due within 30 days.
5. **Participant Contact**. We require the name, email addresses, and telephone number of each participant prior to the start of each class.
6. **Participant Substitution**. A participant may be substituted at any time, by contacting natalie@rimtechconsulting.com.
7. **Class Size Reduction**. Participant cancellations may result in a reduction in class size to a lower price level (e.g. from max 6 to max 3). In this case the difference in price between the original and the new class size will be refunded.
8. **Buyer Cancellation**. To cancel, you must notify us 10 days prior to the class date. The class fee will be refunded less a 10% administrative fee. Any cancellation received later than 10 days prior to class start date shall be liable for the full class fee.
9. **RIMtech Cancellation**. RIMtech reserves the right to cancel any class for any reason and will, in such an event, refund the full class cost. RIMtech will make every effort to notify registrants as soon as possible of any such cancellation.
10. **Buyer Postponement**. RIMtech will work with registrants to find a mutually acceptable reschedule date. If such a date is not acceptable to the buyer, a full refund will be issued less a 10% administrative fee.
11. **RIMtech Postponement**. RIMtech reserves the right to postpone/reschedule any class for any reason and will, in such an event, work with registrants to find a mutually acceptable reschedule date. If such a date is not acceptable to the registrants, a full refund will be issued. RIMtech will make every effort to notify registrants as soon as possible of any such cancellation.
12. **Liability**. RIMtech assumes no liability for changes in course dates or content.
13. **Currency.** All fees are in US dollars.

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