

RFx Templates and User Guides

The Procurement School proudly presents its latest innovation: RFx templates crafted for use by the Canadian public sector to meet the stringent standards of trade agreements.

Our best-in-class RFx templates redefine simplicity and efficiency, empowering your team and potential bidders. Whether you're a small organization without a dedicated procurement department or a large entity seeking centralized procurement solutions, our templates are tailored to fit your needs seamlessly.

Pain Areas

Our RFx Templates and User Guides address the following pain areas:

- When the organization uses overly long and legalistic RFx templates it results in (a) excessive staff time spent preparing documents, (b) staff struggle with the RFx template, filling it out wrong or changing crucial clauses (our model addresses this),(c) bidders opt to not bid as the RFx is difficult to understand, and takes too much time to prepare a bid, (d) if a bidder does prepare a bid the bid is non-compliant as the RFx was not clear.
- When the organization does not have RFx templates, internal staff look to samples from other organizations which may give rise to legal risks and other issues.

Target Audience:

- Decision makers, project sponsors, person responsible for the procurement function in any organization: COO, Treasurer, VP Finance, Director Procurement, Procurement Manager, Chief Administrative Officer
- Buyers, procurement staff, Department heads, Line managers

Key Components

- **Request for Proposal (RFP) template:** Our RFP package includes a three-part template: an RFP Lite version for lower price and complexity projects, a user manual for guidance, and a 30-minute complimentary session with a subject matter expert to discuss your organization's needs.
- **Request for Quote (RFQ) template:** Our RFQ package includes a three-part template: an RFQ Lite version for lower price and complexity projects, a user manual for guidance, and a 30-minute complimentary session with a subject matter expert to discuss your organization's needs.
- **Request for Information (RFx) template:** Our RFQ package includes a two-part template with a user manual for guidance and a 30-minute complimentary session with a subject matter expert to discuss your organization's needs.

About

Since 1980, The Procurement School has been helping Canadian public sector organizations realize maximum value through their procurement and contracting activities.

Incorporating the latest developments in adult education and curriculum design, our online and blended learning options capture the latest legal, practical, and business developments to empower procurement professionals to improve contract outcomes.

Ready to revolutionize your procurement process?

Take the first step with a free consultation session. Contact us today at:

hello@theprocurementschool.com
250-370-0041

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- **Request for Prequalification (RFPQ):** Our RFPQ package includes a user manual for guidance and a 30-minute complimentary session with a subject matter expert to discuss your organization's needs.
- **Request for Standing Offer (RFSO):** Our RFSO package includes a user manual for guidance and a 30-minute complimentary session with a subject matter expert to discuss your organization's needs.
- **Request for Tenders (RFT):** Our RFT package includes a user manual for guidance and a 30-minute complimentary session with a subject matter expert to discuss your organization's needs.
- **All templates:** If you wish to buy all templates, then we offer 20% discount on the standard price, 2 hour complimentary session with our subject matter expert to discuss your organization's needs.
- **Custom needs:** If these options do not work for your organization's unique needs, then our subject matter expert will offer you a complementary 60 minutes meeting for a custom consulting engagement.

Key Features:

- Developed by seasoned procurement and legal professionals.
- Fully compliant with trade agreements.
- Embodies best practices of RFX template design.
- Crafted in plain English for easy comprehension.
- User-friendly interface for seamless navigation.
- Easily customizable, complete with comprehensive customization instructions.

Testimonials

I like the modularity of the forms. Suppliers are finding them easier to understand and follow. The templates are easier overall because they are not as long but continue to have the necessary details. A big change for us and I think they are overall more professional (difficult to quantify, but more of a feeling from the team). **Director, Procurement, Ontario College**

The new RFX templates are so much easier as a procurement professional to use. It takes me less time to prepare an RFP than it did before. I have less bidders trying to change the contract. You have provided an excellent format for us to use. I have not had one bidder disqualified since using them. I have experienced smaller companies bid now because the documents are not as intimidating to use as our old template. As I have mentored new buyers on new templates, their feedback has been 'this is so much easier to use!' and they have demonstrated confidence when using them. **Senior Manager, Strategic Procurement, Ontario College**

Pricing Quote: Pricing for these products ranges from \$2395 and higher. Please schedule a complimentary call with our subject matter expert to understand your organization's needs to generate a custom price quote.

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Contact us today at: hello@theprocurementschool.com or by phone: 250-370-0041.