



Custom Software Development – an RFP Benefit?

Designing custom software can seem like a daunting process. One of the most common questions we hear is I have never done this before, where do I begin? In many cases, a custom process may be well described and spec'd out by consulting w/ DHD about your desired process. For example, if it is a project for which we have previously done something similar, the will be reflected accordingly in the quote provided. For most projects, a custom project will require both a Research and Development quote being provided. That process is reviewed within our DHD site (link to site location) ...

However, in certain situations, it may be a very large custom development strategy for which a client has in mind. In certain cases, it may require something more than a normal Research/ design and Quote process. In some cases, whether working directly w/ our DHD team, or another outside development resource, a client may wish to consider an RFP process for helping articulate the scope of custom project development being considered.

The benefits for developing an RFP can be significant in helping describe your project idea, and to provide potential developer's deeper insight for what your vision and objectives are for completing the project.

Though more the exception than the rule when considering a custom development project, an RFP may be an excellent strategy for helping ensure your overall project vision is well documented.

1. A Brief Project Overview

Introduce your credit union and the higher-level purpose of the RFP. State not only what you want the service provider to do but also why: is there a central "pain point" your organization has and wants to resolve?

Rather than describing a solution, try articulating the problem as best you can – in your words. There may be all kinds of alternative solutions available that will meet your needs better than what you have in mind. The DHD team can often suggest solutions you may not have thought of yet. By focusing more on the desired job to be done, it encourages our development team to think outside the "techie programmer" box.

2. Your Organization's Background

Describe your organization, what it does, and what you do from both a business and services vision. For example, we know that you are a credit union. However, there's a good chance that how we view you is totally different than how you view yourselves within. What makes your organization tick? In most cases, it is not something we can easily measure by simply visiting a credit union's website (for which you may need a refresh) or simply conversing electronically. Tell us a bit about your organizational values. What makes you unique? Why does what you do as a credit union matter?

3. Project Goals and Target Audience

Next, describe what you plan to accomplish or what outcome you have in mind. Such as, what are the 2-3 most important things that, if done well, will make the project a success in your eyes? Again, think both business wise (bottom line/ serving membership) and internal staff (efficiencies gained). What are you attempting to accomplish? It goes without saying, but the more clearly you articulate what you want out of the process, the more likely you are to get it. Knowing both the concrete goals and community whose needs you're trying to serve will make the development team's job that much easier (and effective!). It also means when facing a decision point, you'll be guided more by objective outcomes than personal preferences.

4. Scope of Work and Deliverables

Here's where you want to provide more detail about the project. To the extent you can, describe the new services you are looking for. For example, for a large web redesign project, you might desire (and be paying for):

- Project Research and Management
- Content strategy
- Illustrations/ Visual design
- Information content
- Search engine optimization
- Front-end coding (HTML)
- Back-end coding (3rd party APIs)
- Custom software or app development
- Mobile device optimization
- Testing & QC assurance
- Documentation
- Software training

Many firms look at a task, estimate the typical time to completion, and arrive at a cost by multiplying by an hourly rate. At CU*Answers, we want to understand and scope out the work in order to get you a best project estimate. The clearer you can set expectations from the outset, the better!

5. Timeline:

You may not know how long a project may take to do, but you often have a timeline to accomplish it within. Is there some hard deadline you need to hit, such as the launch of a new product or 3rd party vendor contract commitment? Maybe you have a big event (i.e. incoming merger) approaching and need the functionality live by then? Be advised: custom software development timing varies widely in their time to completion. Even projects that seem simple can take much longer than initially anticipated, so plan early! For a large project, it can take time to assimilate your credit union's goals, values, and unique business/ membership proposition. Be up front about your timeline, and CU*Answers will be honest about its potential/ likelihood to accomplish.

6. Technical Requirements:

This is a pretty broad subject but your goal here is to describe what limitations or requirements you know in advance. For example, most understand the core CU*BASE system is a very comprehensive and technical software product, so these are the types of details that may most materially impact the schedule and deliverables.

For some projects, the technical requirements section may be one of the longest sections of an RFP, depending on the complexity, because there are tons of variables to work out that will impact the scope. Our message – the more details you can provide up front, the better the Project Quote and overall experience.

7. Principal Point of Contact:

It seems simple, right? When working on a comprehensive project, there are often many folks and deplanements engaged within the process. In many cases, the writer of the RFP are the ones leading the project. However, if not, are there are other team members involved, specify who they are. Have you or they worked previously on a custom software development project for the credit union? Also, do you have final authority for making decisions, or do on-going project decisions need to be made within a committee and or Executive level? Being able to contact the right person as needed can save valuable time and expense.

8. Budget Considerations:

Yes, it is strongly recommended to include an estimated budget for the project, even if it's your best guess. Do you really envision a Ferrari, but only have a Hyundai budget? This is important us to know when considering a custom project. Remember, for most custom processes, an initial Research process will first be completed to gain a deeper project perspective, followed by the actual Project Quote. It is always helpful to know the budget expectations (and constraints) a client has prior to proceeding ahead. In the case where a budget truly isn't known, at least let us know what "level" you want by pointing out other industry examples you potentially want to emulate or you think would suit your needs. As a credit union, you're already a professional financial institution seeking a professional development service. Just as with your members, it's normal (and OK) to talk about money considerations.

9. On-going Support:

When the custom project is done and launched, what then? It's pretty typical to engage CU*Answers in an ongoing strategy for helping ensure support and potentially, ongoing development as CU*BASE is constantly being upgraded and enhanced per new Release offerings, etc. How will you ensure your process is consistently supported in future iterations?

Conclusion:

To summarize, there are some common elements CU*Answers has seen having navigated dozens of client/ consultant RFP processes over the years. As initially mentioned, it may seem overwhelming, but there's a really good chance you've already addressed many of these questions in internal conversations. Obviously, this list isn't all-inclusive and there may be other elements to include, however, we hope this may serve as a starting point to think your project through from beginning to end...

Whether working with CU*Answers DHD or another vendor, RFP's represent a signal that you are taking the project seriously, that you're investing time to understand what success means to you, and to identify what you're really looking for. Just like you, we want our development teams to be excited about your development initiative... inevitably, it just leads to better outcomes.

Final point – the better the RFP is, the better we can tailor a Research Design strategy and Project Development quote. Ready to get started? Just give us a call – we can help build out your creative vision!