The **AOTMP® Industry Leadership Committee** is an elite team of **Advisory Council Platinum** members & **Efficiency First® Solution Certified Industry Leader member** vendors who collaborate to help shape, promote, and advance the future of technology management by driving innovation and raising industry standards.

Founding members met on June 4, 2026, to discuss industry challenges, opportunities, and next steps to address challenges and leverage opportunities. The document outlines a core discussion of: **RFx Misuse in Technology Expense Management Sourcing Events**.

DISCUSSION CONTEXT: THE WHY

- Traditional Technology Expense Management RFx approaches often rely on generic templates, long questionnaires, and abstract requirements that do not reflect the buyer's real environment or decision needs to select a TEM solution.
- As pricing pressure, security expectations, and solution configuration differences continue to grow, organizations need better ways to align TEM vendor sourcing decisions with business outcomes and actual value.

DISCUSSION RECAP

A major theme was the need for context in sourcing. Several participants noted that a proof of concept may be valuable in the decision-making process, particularly when a buyer wants to validate how a solution performs using its own data, workflows, and environment. That idea was discussed as one potentially useful way to move beyond generic demos and templated responses, rather than as a formal consensus recommendation.

The group also discussed how RFx processes are often treated as paper exercises, with too much emphasis on long questionnaires, early-stage feature lists, and price comparisons that do not reflect real-world complexity. There was discussion about bringing must-have contractual terms and security requirements earlier in the process to prevent surprises at the end of a sourcing cycle.

Another major thread was pricing pressure and the tendency to compare unlike offerings as though they are identical. Participants raised concerns that procurement often focuses too heavily on the lowest price rather than the value delivered, especially when software-only, managed services, and full-service models are lumped together in the same comparison.

The discussion closed with a broader concern that the Technology Expense Management industry is being undervalued and that buyers and vendors alike need clearer framing around what is included, what outcomes are expected, and how different solution configurations should be evaluated.

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DISCUSSION TAKEAWAYS

- Define the "why" and expected outcomes before launching an RFx.
- Address security and contract terms earlier in the process when needed.
- Use real-world validation, including a proof of concept when appropriate, to test fit of the proposed solution in the buyer's environment.
- Vendors price services differently, so price, scope, and value gained must be thoroughly understood before making comparisons or decisions.
- Focus on value, outcomes, and business fit rather than only the lowest price.
- Reframe savings as the result of efficient processes and better governance, not the sole value proposition.
- Industry guidance for more effective RFx design and governance practices would be beneficial to buyers and sellers alike.

CONCLUSIONS

1. **RFx quality improves significantly** when the buyer starts with a clear business problem, not a generic template.
2. **Buyers and vendors both benefit** when sourcing discussions reflect the real operating environment, service scope, and constraints.
3. **A proof of concept can be a useful decision aid** when the goal is to validate fit, complexity, and operational impact.
4. **Price alone is a weak decision criterion** when solution configurations, support levels, and implementation effort differ.

PRACTICAL ACTIONS FOR TECHNOLOGY MANAGEMENT PROFESSIONALS

1. **Define the business need first**, including the "why," success criteria, and must-have outcomes.
2. **Build RFx documents around use cases, workflows, and operational realities** instead of long generic questionnaires.
3. **Require vendors to demonstrate performance** using relevant data, realistic scenarios, or a proof of concept when appropriate.
4. **Separate pricing comparisons by service model** so software-only, managed services, and full-service options are evaluated fairly.
5. **Include security, compliance, and contractual must-haves** earlier in the process to reduce late-stage surprises.
6. **Tie sourcing decisions to measurable value**, not just initial price.

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