VALUE-BASED TECHNOLOGY EXPENSE MANAGEMENT (TEM) SOURCING FRAMEWORK

AOTMP
Industry Leadership Committee

RFx Checklist

Use this checklist as a simple guide to structure RFx development and evaluation around the real business needs for a Technology Expense Management solution. Start by defining the intent, then narrow the scope, apply the evaluation criteria consistently, and use the decision factors to compare responses in a fair and practical way.

Before sending the RFx, make sure the team agrees on the problem to be solved, the expected outcomes, and the must-have requirements. During review, use this checklist to keep vendors aligned to the same standards, reduce subjective debate, and support a clearer final decision based on fit, value, and risk.

INTENT	SCOPE	EVALUATION CRITERIA	DECISION FACTORS
☑ What business problem are we solving?	☑ What is included in the request?	☑ Fit with business requirements and real operating environment.	☑ Which criteria are must-have versus nice-to-have?
☑ Why are we issuing this RFx now?	☑ What is excluded from the request?	☑ Ability to demonstrate performance using relevant data or scenarios.	☑ How will different service models be compared fairly?
☑ What outcomes must improve?	☑ What use cases, workflows, or operating environments must vendors address?	☑ Quality of implementation approach and support model.	☑ How will price be evaluated relative to scope and service level?
☑ What does success look like in measurable terms?	☑ What services are being requested?	☑ Security, compliance, and contractual readiness.	☑ What risks would disqualify a vendor?
☑ Is this a fit check, a pricing exercise, a replacement decision, or a proof of concept?	☑ What data, systems, or integrations must be considered?	☑ Total value delivered, not just initial price.	☑ What evidence is required to support the recommendation?
	☑ Is a proof of concept required or optional?	☑ Clarity of assumptions, limitations, and dependencies.	☑ Who makes the final decision, and what approvals are needed?
		☑ Vendor credibility, references, and ability to execute.	

SIMPLE SCORING FORMAT					
Use a basic 1–5 scale for each major factor:	• **5** = Excellent fit.	• **4** = Strong fit.	• **3** = Adequate fit.	• **2** = Weak fit.	• **1** = Poor fit.
Suggested weighting:	• **Business fit:** 30%.	• **Scope and service alignment:** 20%.	• **Demonstrated solution performance:** 20%.	• **Security/compliance/contract fit:** 15%.	• **Price and value:** 15%.

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