

# RFP Template for Government Contract Lifecycle Management Solutions

## Introduction

### Organization Background

Include a brief overview of your organization and the department(s) responsible for managing your company's portfolio of government contracts, subcontracts, and commercial agreements and ensuring compliance with regulations and contractual obligations.

- Organization information
  - Type of organization
  - Type(s) of products/services delivered and customers served
  - Organizational structure (*e.g.*, business units/sectors)
  - Geographic scope of your organization

### Project Information

- Project Overview and Background

Include a brief description of your project:

- Type of solution you are seeking and key goals and objectives for your new solution (*e.g.*, improved efficiency, greater visibility, better collaboration, more effective compliance/risk management, cost reduction, etc.)
- Current systems/processes in place to manage the Contracts organization's pre- and post-award responsibilities related to the pursuit and performance of government and commercial contracts, management of compliance with related regulations and contractual obligations, and use of key metrics to help optimize business performance
- Any system integrations required (*e.g.*, with ERP, document repository, productivity suite, or other systems)
- Any special implementation requirements

- Project Timeline

Include a timeline with key milestones and dates, such as:

- Date RFP released to potential vendors
- Vendor intent to accept or decline bid due
- Deadline for receiving vendor questions regarding RFP
- Timeframe for replying to vendor questions
- Date RFP response is due from vendor
- Target timeframe for vendor presentations/demos
- Target date for selection of vendor
- Target date to finalize contract
- Target date to complete implementation

### RFP Instructions

Include any necessary instructions for completing the proposal and the RFP process (*e.g.*, where to send questions, where to send completed response, any formatting requirements, requirements for hard copies/electronic submission, etc.)

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## 1 Vendor Information

### 1.1 Ownership/Structure

- 1.1.1 Is your company public or privately-owned?
- 1.1.2 Where is your head office located? Do you have other office locations? If so, please list.
- 1.1.3 Where are your software development centers located?
- 1.1.4 Where are your support centers located?
- 1.1.5 How many employees does your company have?
- 1.1.6 What is the average tenure of your employees?
- 1.1.7 How many people do you have dedicated to product management and software development?
- 1.1.8 How many people do you have dedicated to implementation/delivery?
- 1.1.9 How many people do you have dedicated to customer support?
- 1.1.10 How many people do you have dedicated to account management/customer success?
- 1.1.11 If you are responding to this proposal with partners, please describe the relationship between your company and these third parties.

### 1.2 History/Experience/Viability

- 1.2.1 Provide a brief history of your company (e.g., when founded, any M&A activity, funding received, growth, etc.)
- 1.2.2 How long has your company been in business?
- 1.2.3 How long has your company been delivering contract lifecycle management (CLM) solutions?
- 1.2.4 Does your company actively participate with any government contracting/ GovCon/Aerospace & Defense-related industry organizations? Please provide details.
- 1.2.5 Describe any thought leadership activities related to government contracting in which your company or its staff have recently participated.
- 1.2.6 Describe the financial strength and stability of your company. If public, please provide your latest financial statements.
- 1.2.7 What percentage of its annual revenue does your company's largest single client represent?
- 1.2.8 Are there any actions, suits, or proceedings pending or threatened against your company? If so, please describe.

### 1.3 Client Base/Competitive Differentiation

- 1.3.1 How many total clients does your company currently serve?
- 1.3.2 What percentage of your total client base do GovCon and Aerospace & Defense companies represent?
- 1.3.3 What percentage of your company's annual revenue is generated by clients in the GovCon and Aerospace & Defense sectors that are using your CLM solution?
- 1.3.4 What percentage of your company's annual R&D budget is spent on advancing your CLM solution to meet the requirements of government contractors?
- 1.3.5 Describe what differentiates your CLM solution from other vendors' solutions.

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## 2 Government Contract Lifecycle Management Solution Requirements

### 2.1 General Requirements

- 2.1.1 Provide an overview of your solution for government contract lifecycle management (CLM): what software and services do you offer to support us in meeting the project objectives described in the Introduction?
- 2.1.2 Is your CLM a cloud-based SaaS solution?
- 2.1.3 Is your solution designed specifically for the needs of government contractors or is it used by a variety of commercial industry verticals?
- 2.1.4 Is your solution able to handle all federal government award types (*e.g.*, IDIQs, GWACs, GSA Schedules, BPAs, Delivery/Task Orders, Basic Ordering Agreements, standalone, etc.), subcontracts from other vendors, as well as commercial agreements (*e.g.*, NDAs, TAs, subcontract agreements, etc.)?
- 2.1.5 Does your solution provide data validations that prevent records from being saved until corrected if missing or inaccurate data is detected (*e.g.*, a required field is missing, invalid dates were entered, more funding put on contract than obligated, etc.)?
- 2.1.6 Describe your solution's support for configurable automated alerts/reminder notifications (*e.g.*, for reviews, tasks, required action, status changes, etc.).
- 2.1.7 Describe your solution's ability to incorporate our company's Delegation of Authority requirements into system workflows/processes.
- 2.1.8 Describe your solution's mobile capabilities. For example, will our users have secure mobile access to view contract records and documents? Can they perform actions such as approvals while on-the-go?
- 2.1.9 Describe your solution's use of AI to empower our Contracts team to operate more efficiently and effectively. Specify any AI agents provided to support and augment the activities of our contracts professionals.
- 2.1.10 Does your solution allow for configured/custom fields and workflows to support our unique needs/processes?
- 2.1.11 Describe how your solution supports our users' ability to personalize their experience based on their own preferences (*e.g.*, personalized dashboards, reports, views, etc.).
- 2.1.12 Document/File Management
  - 2.1.12.1 Describe your solution's ability to provide a centralized, secure, searchable repository for all contract-related documents and files (*e.g.*, PDF, MS Office, email, JPG, PNG format files).
  - 2.1.12.2 Describe your solution's ability to manage permissions/access to stored documents and files.
  - 2.1.12.3 Does your solution support document check-in/out and version control?
  - 2.1.12.4 Does your solution provide the ability to tag documents with metadata?
  - 2.1.12.5 Does your solution provide the ability to auto-create a standard folder structure to house files associated with each contract record?
- 2.1.13 Search & Usability

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- 2.1.13.1 Describe the search capabilities available with your solution to help us quickly locate information.
- 2.1.13.2 Describe how your solution enables users to interact with search results. Can they be filtered? Exported in Excel and CSV formats?
- 2.1.13.3 Describe your solution's support for saved searches.
- 2.1.13.4 How are search results limited based on a user's access/permissions?
- 2.1.13.5 Does your system provide a chatbot that allows users to ask and get answers about contracts using ordinary language?
- 2.1.13.6 Does your solution provide any Help function within its interface?
- 2.1.14 Reporting
  - 2.1.14.1 Does your solution support real-time reporting? If not, how often is the data refreshed?
  - 2.1.14.2 Please provide a list of the standard government contract lifecycle management reports provided out-of-the-box with your solution.
  - 2.1.14.3 Describe the dashboard capabilities of your solution to help us monitor our KPIs (e.g., contract expirations, funding expenditures, contract amounts, etc.). Are the dashboards configurable by our users? Do they provide drill-down capability?
  - 2.1.14.4 Can our organization run reports on any data tracked in your solution? Please describe users' ability to create ad hoc reports.
  - 2.1.14.5 Describe your solution's ability to search/filter reports.
  - 2.1.14.6 Describe your solution's ability to add/remove/move columns within reports.
  - 2.1.14.7 Describe your solution's ability to incorporate data visualizations (e.g., charts, graphs, etc.) into reports.
  - 2.1.14.8 Describe your solution's ability to export reports. Which formats are supported (e.g., Excel, PDF)?
  - 2.1.14.9 Describe your solution's ability to support scheduled reports.
  - 2.1.14.10 Describe your solution's ability to report by business unit or by function.
  - 2.1.14.11 Describe any AI-assisted reporting supported by your solution (e.g., an agent that can create and distribute a weekly executive summary on key risk areas, action items, etc. across our contracts portfolio).
- 2.2 Pre-Award
  - 2.2.1 RFI/RFP Review & Evaluation
    - 2.2.1.1 Describe your solution's ability to track incoming solicitations, route them for review/approval, and capture bid/no bid decisions.
    - 2.2.1.2 Does your solution provide the ability to digitize an RFP document and intelligently extract key details from the solicitation (e.g., clauses, CLINs/SLINs, etc.) to support our organization's solicitation review and evaluation process? If so, please describe.
    - 2.2.1.3 Does your solution provide an AI-powered digital assistant to help with assessment of incoming solicitations and the production of proposal artifacts? If so, please describe.

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- 2.2.1.4 Describe how your solution enhances the Contracts team's ability to communicate a contract's regulatory and other key requirements to stakeholders to support activities such as Bid/No Bid decisioning, requirements shaping, proposal development, risk mitigation planning, and building of cost estimates.
- 2.2.2 Partner Planning/Non-Disclosure Agreement & Teaming Agreement Establishment
  - 2.2.2.1 Describe the capabilities your solution provides to support the creation, negotiation, approval, and execution of NDAs and TAs.
  - 2.2.2.2 Describe how your solution automates the creation of NDAs and TAs.
  - 2.2.2.3 Describe how your solution supports agreement review and approval. Are both on- and offline redlining supported? Does this workflow integrate with our document repository?
  - 2.2.2.4 Can workflows be triggered based on pre-defined criteria (e.g., contract type, value, etc.) or our company's Delegation of Authority matrix?
  - 2.2.2.5 Does your solution provide the ability to compare versions during the agreement negotiation and redlining process and is this AI assisted? If yes, please describe.
  - 2.2.2.6 Describe any capabilities your solution provides to help us analyze risk in support of our redlining of agreements.
  - 2.2.2.7 Does your solution support the use of digital signatures for agreement execution? If so, please describe.
  - 2.2.2.8 Describe how your solution provides visibility into the current status of each agreement.
  - 2.2.2.9 Describe any tools your solution provides that offer guidance on how prime terms and conditions must be flowed down to subcontractors/suppliers.
- 2.2.3 OCI Review
  - 2.2.3.1 Describe the capabilities your solution provides to initiate and manage the Organizational Conflict of Interest (OCI) review process, including any workflow to route and record OCI responses and ability to capture OCI mitigation plans.
- 2.2.4 Past Performance Repository
  - 2.2.4.1 Describe your solution's ability to track past performance details associated with each contract and identify relevant past performance to support business development activities.
- 2.2.5 Proposal Development
  - 2.2.5.1 Describe your solution's ability to track our company's proposal activity, including proposal details such as proposal team members, pricing/cost information, clauses, etc. and support collaborative proposal development.
- 2.2.6 Negotiations
  - 2.2.6.1 Describe any capabilities your solution provides to support and document contract negotiations.
  - 2.2.6.2 Describe any capabilities your solution provides to support and automate the TINA (Truth in Negotiations Act) sweep and certification process.

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### 2.3 Contract Award & Project Launch

#### 2.3.1 Contract Setup

- 2.3.1.1 Describe the options your solution supports for creation of new contract records – e.g., manual, cloning of an existing record, ingestion of contract documents, etc. Can we create a new contract record using data from an ERP or CRM system?
- 2.3.1.2 Describe the process for creating a new contract record in your system that is inclusive of critical details that must be tracked for government contracts (e.g., FAR clauses, CLINs/SLINs, deliverables and other obligations, etc.). We are particularly interested in understanding any automation that your solution brings to the contract intake process.
- 2.3.1.3 Does your solution provide the ability to digitize government contracts, subcontracts, and/or purchase orders, intelligently extract data for review and validation by a contracts professional, and then insert it into a contract record (e.g., extract FAR clauses so manual clause entry is not required)?
- 2.3.1.4 Does your solution provide workflow to support review and approval of a contract?
- 2.3.1.5 Does your solution support parent/child and parent/child/grandchild contract hierarchies (e.g., IDIQ/BPA/Task Order)?
- 2.3.1.6 Does your solution provide out-of-the-box contract record data fields consistent with managing government contracts and related subcontracts/commercial agreements? If yes, please describe.
- 2.3.1.7 Does your solution enable tracking of AACs (Activity Address Codes), CAGE codes, and sites associated with our contracts/subcontracts and the related accounts?
- 2.3.1.8 Describe how your solution provides forms/pages that are tailored to capture relevant critical government contract details.
- 2.3.1.9 Describe any validations your solution provides to help ensure the accuracy of captured data.
- 2.3.1.10 Does your solution provide the ability to auto-create a standard folder structure to house files associated with a contract record, including any related agreements, subcontracts, etc.?
- 2.3.1.11 Does your solution include a clause library that comes pre-loaded with federal regulatory content (e.g., FAR, DFARS, and agency supplements)? If yes, please specify which agency supplements are included. Are historical versions of clauses included? Are class deviations included? Are DEFCONs/DEFSTANs included?
- 2.3.1.12 If federal regulatory content is provided, describe how this content is kept current with updates. Is this a manual or automated process?
- 2.3.1.13 If federal regulatory content is provided, does your solution provide clause comparison capabilities (i.e., the ability to compare clauses from a new contract against our clause library)?

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- 2.3.1.14 Does your solution's clause library enable designation of clauses that must be flowed down to child contracts?
- 2.3.1.15 Does your solution's clause library enable designation of clauses that are of particular interest to our business or a particular department (*e.g.*, clauses we consider to be high-risk)?
- 2.3.1.16 Does your solution's clause library enable us to include unique Terms and Conditions (commercial, full text clauses, state and local clauses, etc.)?
- 2.3.1.17 Does your solution provide the ability to digitize award documents, intelligently extract data regarding deliverables, CDRLs, and other obligations, and present it to a contracts professional for easy creation of required deliverables and tasks in the system?
- 2.3.1.18 Does your solution generate a notification to stakeholders (*e.g.*, contracts, project team, finance, etc.) that contract intake is complete in the system?
- 2.3.2 Project Launch
  - 2.3.2.1 Describe your solution's ability to track internal contract/project kick-off activities and store related files/documents.
  - 2.3.2.2 Describe how your solution enhances the Contracts team's ability to communicate a contract's regulatory and other key requirements to stakeholders in project kick-off meetings.
- 2.4 Contract Performance
  - 2.4.1 Contract Administration
    - 2.4.1.1 Describe any AI-powered contract summarization capabilities provided by your solution.
    - 2.4.1.2 Does your solution provide an AI-powered digital assistant that can assist with rapid response to questions about a contract or the production of stakeholder briefs or other artifacts? If so, please describe.
    - 2.4.1.3 Describe any alerts and notifications provided by your solution to help our organization keep on top of compliance throughout the contract lifecycle (*e.g.*, alerts when Period of Performance is ending).
    - 2.4.1.4 Describe your solution's ability to track changes to project funding and contract value by CLIN/SLIN/ACRN throughout the contract lifecycle.
    - 2.4.1.5 Describe your solution's ability to help our contracts professionals identify the need to send a Limitation of Funds/Cost letter for a contract. Does your solution provide the ability to generate the letter in one click?
    - 2.4.1.6 Describe how your solution enables us to track contract labor category requirements. Are we able to import/export labor categories/rates in bulk to/from the CLM to/from another system?
    - 2.4.1.7 Describe how your solution helps our organization maintain compliance with prevailing wage determinations.
    - 2.4.1.8 Describe how your solution supports our ability to maintain compliance with required deliverables and other contract obligations throughout the contract lifecycle, including the ability to set up and track deliverable due dates, create tasks/notifications/alerts, and store related deliverable

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- documentation. Specify any AI-assisted capabilities for tracking deliverables.
- 2.4.1.9 Describe how your solution enables us to track and report on CDRLs throughout the contract lifecycle. Specify any AI-assisted capabilities for creating and tracking these types of data deliverables in your CLM.
  - 2.4.1.10 Describe how your solution enables us to track audit agency requests and related documentation for a contract.
  - 2.4.1.11 Describe your solution's ability to produce standard reports to meet annual FAR/DFAR/regulatory reporting requirements.
  - 2.4.1.12 Describe your solution's ability to create a DCAA-compliant contract brief. Is there an option to auto-generate a contract brief each time a contract modification is executed?
  - 2.4.1.13 Does your solution provide the ability to report on labor category data, including qualifications, rates by PoP, and discounts?
  - 2.4.1.14 Does your solution provide the ability to produce a Contract/Subcontract Summary Report?
  - 2.4.1.15 Describe your solution's ability to produce standard reports for internal stakeholders related to compliance, controls, and risk requirements.
  - 2.4.1.16 Describe how your solution enhances the Contracts team's ability to respond to ad hoc data calls and questions from both internal stakeholders and customers throughout the contract lifecycle.
- 2.4.2 Manage Subcontracts and Other Commercial Agreements
- 2.4.2.1 Describe any tools your solution provides that offer guidance on how prime terms and conditions must be flowed down to subcontractors/suppliers.
  - 2.4.2.2 Does your solution support validations to ensure that any required prerequisite agreements – *e.g.*, NDA and TA – are in place before subcontract agreement creation?
  - 2.4.2.3 Describe the capabilities your solution provides to support the creation, negotiation, approval, and execution of subcontracts and other types of commercial agreements.
  - 2.4.2.4 Describe how your solution automates the creation of agreements. What capabilities does your solution provide to ensure the appropriate flow down of clauses and capture of CLINs/SLINs, PoP, labor categories, etc. from the prime contract?
  - 2.4.2.5 Describe how your solution supports agreement review, negotiations, and approval. Are both on- and offline redlining supported? Does this workflow integrate with our document repository?
  - 2.4.2.6 Can workflows be triggered based on pre-defined criteria (*e.g.*, contract type, value, etc.) or our company's Delegation of Authority matrix?
  - 2.4.2.7 Does your solution provide the ability to compare versions during the agreement negotiation and redlining process and is this AI assisted? If yes, please describe.
  - 2.4.2.8 Describe any capabilities your solution provides to help us analyze risk in support of our redlining of agreements.

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- 2.4.2.9 Does your solution support the use of digital signatures for agreement execution? If so, please describe.
- 2.4.2.10 Describe your solution's ability to create and manage small business subcontracting plans and produce the required reporting to demonstrate compliance relative to our commitments.
- 2.4.3 Manage Contract Modifications
  - 2.4.3.1 Does your solution support tracking of contract modifications as children of the original contract?
  - 2.4.3.2 Does your solution provide the ability to digitize contract modification documents and intelligently summarize and assess contract changes for our contracts professionals to validate and then execute on the contract record?
  - 2.4.3.3 Does your solution support a review and approval workflow for modifications?
  - 2.4.3.4 Does your solution provide a roll-up of all related contract modifications that calculates and displays the current contract value?
  - 2.4.3.5 Does your solution provide the ability to track additions/deletions and references to clauses during contract modifications?
  - 2.4.3.6 Does your solution provide the ability to track administrative changes made by contract modifications?
  - 2.4.3.7 Describe how your solution supports our ability to issue and track change orders and modifications to subcontracts and agreements.
- 2.4.4 Manage Assessments and Adverse Actions
  - 2.4.4.1 Describe the capabilities your solution provides to track and report on the performance of a contract (financials, compliance, etc.).
  - 2.4.4.2 Describe your solution's ability to track CPAR or other interim performance evaluations related to a contract. Does your solution provide the ability to digitize CPAR documentation to extract data and create a CPAR record in the system? Can CPAR self-assessments be initiated automatically? Is workflow provided to route CPAR records internally to gather feedback and substantiating documentation. Can related adjudications be tracked?
  - 2.4.4.3 Describe your solution's ability to track any adverse action activities related to a contract. Is workflow provided to route adverse action records internally to inform stakeholders, gather feedback and substantiating documentation, and develop/approve a corrective action plan?
  - 2.4.4.4 Describe your solution's ability to track working at-risk, including any internal review and approval process.
- 2.5 Contract Closeout and Final Contractor Performance Evaluation
  - 2.5.1 Describe how your solution supports contract closeout activities.
  - 2.5.2 Does your system provide the ability to generate a 30/60/90-day closeout notification based on the final contract end date to alert stakeholders to initiate closeout activities?

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- 2.5.3 Does your solution provide the ability to initiate a subcontract closeout workflow, including the ability to configure subcontract closeout task lists, assign tasks to stakeholders, notify external points of contact, and track required reviews/approvals?
- 2.5.4 Does your solution provide the ability to initiate a prime contract closeout workflow, including the ability to configure prime contract closeout task lists, assign tasks to stakeholders, notify external points of contact, and track required reviews/approvals?
- 2.5.5 Describe your solution's ability to track final CPAR or other performance evaluations related to a contract. Does your solution provide the ability to digitize CPAR documentation to extract data and create a CPAR record in the system? Is workflow provided to route CPAR records internally to gather feedback and substantiating documentation to shape responses and manage mitigation efforts. Can related adjudications be tracked?
- 2.6 System Administration
  - 2.6.1 Describe the processes for creating new user accounts in your solution and managing role-based security.
  - 2.6.2 Describe how your solution supports our ability to define and deliver a relevant, role-based user experience to our end users.
  - 2.6.3 Describe the types of configuration changes that we can perform in-house with your solution and the required skillset.
  - 2.6.4 Describe your solution's ability to maintain an audit trail of the creation, modification, and deletion of contract details, including what was changed, when it happened, and who made the change.
- 2.7 Integrations
  - 2.7.1 Describe the standard integration/interfacing capabilities that your solution provides to enable data flow between your CLM solution and other enterprise systems or data repositories.
  - 2.7.2 Describe your solution's ability to integrate with our organization's ERP system (e.g., Costpoint, Unanet, Jamis, Microsoft Finance & Operations, SAP, etc.). Please explain your integration methodology and the capabilities enabled by this integration.
  - 2.7.3 Describe your solution's ability to integrate with our organization's document repository (e.g., Microsoft SharePoint). Please explain your integration methodology and the capabilities enabled by this integration. Can you support integration with an on-premise document repository?
  - 2.7.4 Describe your solution's ability to integrate with our organization's email system/productivity suite (e.g., Microsoft Office). Please explain your integration methodology and the capabilities enabled by this integration.
  - 2.7.5 Describe your solution's ability to integrate with single-sign-on (SSO) or identity providers.
- 2.8 Technical/Security
  - 2.8.1 Which compliance levels/certifications for data protection and cybersecurity do your organization hold?
  - 2.8.2 Does your organization hold SOC 2 Type II certification?
  - 2.8.3 How does your solution protect Controlled Unclassified Information (CUI)?

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- 2.8.4 Describe how your solution meets FedRAMP [High/Moderate] requirements.
  - 2.8.5 Will your organization accept flow-down requirements of DFARS 252.204-7012?
  - 2.8.6 Does your solution support compliance with the requirements of NIST 800-171 and CMMC Level 2 at minimum?
  - 2.8.7 Does your organization have an independent application penetration testing report?
  - 2.8.8 Please provide a diagram of your proposed CLM solution's technical architecture.
  - 2.8.9 If your solution incorporates AI capabilities, how does your organization ensure the integrity of the AI models it uses?
  - 2.8.10 Describe how your solution's architecture ensures that our company's data remains private/will never to be used to train foundational models.
  - 2.8.11 Does your organization have a clear governance structure for AI development and deployment, including defined roles and responsibilities for AI risk management?
  - 2.8.12 Does your organization ensure compliance with applicable legal, regulatory, and industry standards related to AI?
  - 2.8.13 Describe how your solution supports role-based access and privileges within the CLM.
  - 2.8.14 Describe the user security, authentication, and authorization options available with your solution.
  - 2.8.15 Does your solution support MFA (multi-factor authentication)?
  - 2.8.16 Describe the password management capabilities your solution provides to support password policies. How are login attempts logged and managed?
  - 2.8.17 Will our solution's data and data backups be stored and remain at all times within the continental US?
  - 2.8.18 Who is the hosting provider for your solution? Where is the hosting location?
  - 2.8.19 What compliance levels/certifications for data protection and cybersecurity does your hosting provider hold?
  - 2.8.20 Do you have employees or contractors located outside the US? Will non-US citizens have access to our system and data?
  - 2.8.21 Describe your processes for data backup and recovery. How often is data replicated between the primary and backup/disaster recovery data centers? What is the RTO (Recovery Time Objective)? Where is the backup location located?
  - 2.8.22 Describe how your system protects data at rest and data in transit. Is both primary and backup data encrypted? Do third-party integrations with your system protect data using encryption?
  - 2.8.23 Describe your company's cybersecurity incident response, recovery, security plans, and policies.
- 2.9 Implementation
- 2.9.1 Provide an overview of the implementation process for your CLM solution.
  - 2.9.2 Describe the team that will be responsible for our company's implementation. Are implementation services provided by your staff or third-party implementation partners?
  - 2.9.3 What resources will be needed from our organization and what is their required level of involvement?

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- 2.9.4 Describe the process for uploading/migrating our organization's contract data.
  - 2.9.5 In your experience, how long has it taken to implement a CLM solution designed to meet requirements similar to our organization's?
  - 2.9.6 How will your company support our smooth and timely transition to your solution?
  - 2.9.7 Describe the training that will be provided for our organization's end users.
  - 2.9.8 Describe the training that will be provided for our staff members who will administer our CLM solution.
- 2.10 Maintenance & Support
- 2.10.1 How often are new releases of your CLM solution available? Do you charge for new product features?
  - 2.10.2 Please include the product roadmap for your CLM solution, including planned enhancements that incorporate AI capabilities.
  - 2.10.3 Describe how the content of future software releases is determined. How do you incorporate customer input? Do you have a client advisory board?
  - 2.10.4 Describe how updates to your system are released and installed. Does the client have control over which updates we take?
  - 2.10.5 How are hot fixes, patches, and other maintenance performed?
  - 2.10.6 Please provide the details of your Service Level Agreements (SLAs) related to your solution's reliability, availability, and performance as well as support issues/requests.
  - 2.10.7 What tools and documentation do you provide for self-serve support? Do you have an online support portal for your customers? If yes, does it employ AI to help customers get answers/find documentation faster?
  - 2.10.8 Describe your customer success/support program and processes. How are customer service issues handled and tracked for resolution? Do you have an online ticket management system? What are your support hours for clients?
  - 2.10.9 What are your support response times based on issue severity?
  - 2.10.10 What is the process for problem escalation and resolution? How is your management team involved?
  - 2.10.11 Do you offer a premium level of support? If so, please describe.
  - 2.10.12 Will we have a dedicated account manager/customer success representative? If so, please describe their role.
  - 2.10.13 Describe any ongoing training support provided (e.g., when we onboard new employees, etc.).

### 3 Pricing

Please provide a pricing quote that is competitive and designed with our organization and our project objectives in mind. Be sure to include both one-time and recurring costs and how costs are computed (e.g., per user, per page scanned, etc.)

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### **4 Past Performance/References**

Please provide 3 client references that represent organizations engaged in government contracting that have actively used your CLM solution for at least 1 year. For each reference, please provide contact information and a brief case study outlining the software/services your company provides for the client. We are especially interested in your work with organizations that are similar in size and scope to us.