POC Evaluation Guide

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READ ME FIRST

ABOUT THE POC GUIDE

This document is designed to get you into your Proof Of Concept (POC) account and help you use it enough to evaluate it against your needs, or at the very least, to help you form a list of questions/topics that we need to discuss together. If you feel this document falls short on that goal, please tell us. We'd love to improve the POC experience, and your feedback can help.

To offer feedback, you can send an email addressed to POC@RFPMonkey.com or you can use the on-line contact form located at http://www.rfpmonkey.com/contact

FIRST THINGS FIRST

Why did you start an RFPMonkey.com POC? Look at these possible answers and see if one of them is what motivated you to check us out:

- I have an RFP that is due soon and I want RFPMonkey to respond to it for me.
- I would like to have more RFPs to respond to. I need more leads.
- I have to create an RFP and put it out for bids.
- I want to see industry-standard responses to common RFP questions.
- I want to see how other companies have responded to RFPs that are out for bid.

If any of the above are similar to why you wanted an RFPMonkey.com POC:

1. Stop. Do not bother reading this document past this section.
2. That's not what we do. RFPMonkey.com is primarily a system in which you store, categorize, and search your RFP content for reuse in subsequent RFPs. It also allows you to track RFP due dates, levels of progress, etc.

YOUR POC CREDENTIALS

You just signed up for a short-term RFPMonkey.com POC. As a result, you received this document and should have received an email with your new log in credentials. If you HAVE received your POC credentials, skip to the next section, called **I Received My Credentials**.

If you have NOT received your credentials:

1. Stop. Do not bother reading this document past this section.
2. Get your credentials
   a. Go to http://www.rfpmonkey.com/app
   b. Click the "*Forgot Password?*" link and enter your email address. If you have an account (including a POC) it will find you by your email address and send you your log on information by email.
      i. If it tells you "Email address not found", you probably didn't complete the POC request. The request form is at http://www.rfpmonkey.com/poc
      ii. If it tells you "User Account Info Sent", then check your email inbox.
   c. If you still don't have your credentials, email us directly at poc@RFPMonkey.com and let us know. We'll work it out from there.

I RECEIVED MY CREDENTIALS

Your credentials consist of your account number, user name, and password. You will need all 3 to log into your RFPMonkey account. Write them here for safe keeping:

Acct Number: _______________
(This should be a 4-digit number.)

User Name: ____
(This is initially the same as your email address.)

Password: ______________________________

When it's time to log on to RFPMonkey.com, you'll enter your credentials on the Log On page. You can get to it directly at http://www.rfpmonkey.com/app or you can first go to http://www.rfpmonkey.com and then click on the **Customer Login** link in the upper right corner.

POC FAQ

- **How long do POCs last?**
  Typically 1 month.

- **How much do POCs cost?**
  Currently $250. Check www.rfpmonkey.com/pricing for the most recent details.

- **How do I get one?**
  If you are reading this document, there's a good chance you already have one. In case you don't, you submit your POC request at http://www.rfpmonkey.com/poc

- **Is the POC account limited in some way?**
  No, POCs are not limited in functionality in any way. However, there is one implementation option that does not apply to POCs: They cannot be implemented with a dedicated database. This option is only available in normal subscription accounts.

- **Can I let members of my team use the account?**
  Sure. Typical POCs can accommodate up to 10 users. Yours may have more.

- **What happens when my POC ends?**
  If the evaluation goes well, we hope you would order a regular account. If the evaluation does not go well, and you don't order a regular account, the POC will be purged/deleted.

- **Can the content that I entered into my POC be preserved if I buy a non-POC account?**
  Yes. Some customers keep their POC content as the starting place for their paid account. Others start fresh.

- **What happens to the POC account (and its contents) if I don't buy a regular account?**
  It gets deleted after your expiration date. If we haven't heard from you, we'll keep your POC account for about a week, in case you decide to move it into a regular account. After that period, your POC and all of its contents will be deleted. No trace of it will remain. If you have informed us that you will not be moving to a regular account, the POC will be deleted on the day following your POC expiration date.

- **What if I decide half-way into the POC that I want to order a paid account?**
  Great. When you are ready, just email us and we'll guide you through the order process. If you order your regular paid account within 30 days of starting your POC, we'll waive the initial set-up fee from your invoice (normally $250). This essentially makes the POC free.

- **Do you use the content from our POC for any purpose?**
  No. We do not keep it, mine it, analyze it, sell it, share it, etc.

HOW TO USE YOUR POC EFFECTIVELY

WHAT'S IN MY POC ACCOUNT?

Your new POC account is the same as a Silver Edition paid account. It includes all of the features of regular non-POC accounts; it's just limited in duration. Here's what you will find in your new POC:

Users – 1 user will be defined in your account. Most likely it is you. You will be defined with full permissions. You can create 9 additional users within this account if plan to have others participate in the evaluation. You decide which permissions to give them based on how they will be participating. There is a User tab in the main menu where you will access your user profile, your user preferences, and view/edit other users (and roles).

Sample User Roles – When we create new accounts (including POCs), we usually include some user roles as well. You can use them as is, edit them to suit you better, delete them, or just ignore them. They make it easy to manage multiple other users with the common permissions. The typical roles we include are: SuperUser, ChannelPartner, Admin-only, Author/Approver, and BasicUser. Our standard for naming roles is to include the word 'ROLE' in the role's name itself (example: 'ROLE:SuperUser'). This makes it very easy to search for role definitions. You can name them using your own standards, or keep our default names.

Sample Categorization/Filter Values – You will assign values to your content for Category, Sub-category, Product, Version, and Knowledge Type. You can then filter your content searches using these values. To help you get moving quickly, we've included some sample values for each of these fields. See and/or edit them by clicking on Filters in the application menu.

- The *Knowledge Type* values are probably best left as they are during your POC. You can change them, but they are probably already very appropriate. You will work mostly in the area called 'RFP Knowledgebase'.

- The initial values for *Category* and *Sub-category* probably are fairly appropriate for you if you happen to be a software company. Otherwise you'll probably want to edit them for your specific needs.

- The initial values for *Product* and *Version* fields are very generic, probably of no use as they are. But we felt it was probably better to have these dummy values than no values at all. It may be easier to understand how to change them than how to set them from scratch. They will need to be tailored to your specific needs, or just ignored during the POC.

Initial Approval Settings – Who can approve content varies by Category (by default). Initially, we have set up your sample categories to be approved by 'Any Approver'. This is fine for most POCs and many regular accounts.

Customizable Field Labels – Certain fields within RFPMonkey.com can be renamed, thus changing their significance within the system, and how you use them. The customizable fields are: Knowledge Type, Category, Sub-category, Product, Version, Source, Competitive Differentiator, and Include In Template. During your POC, you probably want to leave them as you find them.

Here are a couple examples of how they have been customized by current customers. One customer has renamed the Product and Version pair to be Solution and Component to put them more in line with their own corporate vocabulary. Another customer has transformed them into Risk Type and Risk Value. Yet another customer wanted to be able to set approval rights by Product rather than by Category, so for them, we swapped Category & Sub-category and Product & Version. Now, they have the same values to filter on, but the approvals are governed by Product.

Initial Entry Aging Setting – Entry Aging is set to 365 days for new accounts and POCs, so this concept may not come into play during a short evaluation. This means that any entry that has not been approved or updated within the last 365 days will automatically change from *Approved* to *Pending Approval*. This is one way we help you ensure that your content is kept up to date. Valid choices for Entry Aging are 30 days, 60 days, *90 days*, *180 days*, *270 days*, *365 days*, or *None*. Setting Entry Aging to *None* turns this feature off.

RFP Tracking – The RFP Tracking section of RFPMonkey.com is used to track RFP names, due dates, progress, status, and ownership. Your POC account probably will not have any sample RFP projects defined. You can create them as part of your evaluation if you like.

Content / Entries – There are typically no entries in a POC initially. So until you enter some of your own content, you will not be able to evaluate our search functionality, approval workflow, content editor, draft assignment, etc. You will enter your own content as part of your evaluation, and as part of every-day use of a paid account. You only have to enter a couple of entries to get the feel for the entry editor. Enter a hand-full more to begin to have enough content to put our search functionality through its paces.

Some POC clients ask us to pre-populate their account with some sample content from the RFPMonkey.com demo library to allow them to experiment with searching and filtering right away. If you would like this done for your POC, just ask.

WHAT SHOULD I DO WITH MY POC ACCOUNT?

You should use your POC to evaluate RFPMonkey.com's functionality against your needs/expectations. Do whatever you need to do to be able to determine whether or not to order a regular paid account at the end of your POC. This decision often comes down to 1 or more verifications such as:

1. Verify that my expectations of what RFPMonkey.com is/does are correct.
2. Verify that RFPMonkey.com's cloud implementation provides access to my team from anywhere.
3. Verify that RFPMonkey.com has the ease-of-use required for me and my team.
4. Verify that RFPMonkey.com's search functionality is powerful enough to help me quickly find answers to tough RFP questions.
5. Verify that RFPMonkey.com's user maintenance, role definitions, and permission structure give me the flexibility and security needed.

6. Verify that once populated, RFPMonkey.com will allow SME's to quickly respond to an RFP, and will allow non-SME's to gain some self-sufficiency with RFP's prior to passing them to the SME for completion.

POC ACTIVITIES TO CONSIDER

As stated before, you should use your POC to evaluate RFPMonkey.com's functionality against your needs/expectations. Here are some specific things you may want to do as part of your evaluation process.

USERS AND ROLES

You should already have a user account. And your POC should already have several user roles defined. If you will be using RFPMonkey.com by yourself, then you don't need to do more in this section. However if you plan to invite others to work with you, you will need to create user accounts for them. You can add up to a total of 10 users (yourself plus 9 others). Users may be given permissions directly, or may inherit them from being a member of a role. Using roles is optional, but can make user administration easier if you have multiple users with a common set of permissions.

To create a user directly (not as part of a role), click Add User within the User tab. Fill in name, user name, email address, etc. Check the box at the bottom labeled *'Send new user email?'* and then click Save. The new user will be sent an email containing their new credentials.

After a user is added, you can assign them into a role if desired. To do this, click *List Users*, then click the user id of the user you want to edit. At the bottom of the user detail screen, click on *Assign Role*. If the user is already in a role, you would click *Re-assign Role* to change their role or remove the role assignment.

Rather than creating a user and then assigning them a role, you can also create the user directly within the role. To do this, first select the role into which you want to create a user. Then at the bottom of the screen, click *Create User*.

NOTE: Use the List Users sub-menu item to see a list of both users and user roles.

Try these user/role activities:

1. Get a list of your users and roles by clicking List Users in the User sub-menu.

2. Search for yourself in the list of users. Above the list in the List Users results, enter your name or email address (or part of either) into the search box and click Find. This is a good way to display all roles (assuming you maintain our practicing of including the word 'ROLE' in their names.)

3. Hover over the ⓘ icon in the users/roles list for a particular role and see which users are members of that role.

4. Create a new user and assign it some permissions. Now edit that user and assign it to an existing role.

5. Create another new user directly within an existing role. First select the role, then click Create User.

6. Select your user record and examine your personal Preferences.

CATEGORIZATION / FILTERS

In addition to *question*, *response*, and *comments*, your entries will be given values that help to filter search results. These values include *Category* and *Sub-category*, *Product* and *Version*, and *Knowledge Type*. Initial values have been established in your POC already for these filters, but you can create new ones, delete the existing ones, or edit them to meet your needs. The Initial values for *Category* and *Sub-category* will be appropriate for some companies as they are, but will need to be re-done in many cases. The *Product* and *Version* fields are more difficult to make appropriate for multiple customers, so we haven't tried to. You will either want to edit them, or just ignore them for the POC.

Access to these filter values is from the Filters tab.

Try these filter-related activities:

1. Click *Category* to see what categories have been set up in your POC.

2. Click on one of the categories and see its sub-categories.

3. Add a new category. Click *Category* in the menu, and then enter a new category name in the field underneath the list. Click *Insert* next to the field to save it.

4. Add sub-categories to your new category. Click *Category* in the menu, and then click into your new category. Enter sub-category values for it by populating the field and clicking *Insert*.

5. Click *Outline* to see how your categories and sub-categories are represented within your repository of entries. At this point, it should be blank. You haven't entered any entries yet. Try it again later, after you have entered and approved some content.

By default, your categories will be set up to allow any approver to approve them. You can switch valid approver to be in individual or a user role as well. However, for the POC, it's simpler to accept the Any Approver default.

ADD CONTENT

RFPMonkey.com includes a .CSV import to assist you in populating your repository quickly. It is well documented and a sample import file is available.

After an initial population, and during your evaluation, you can add entries by using the Add Entry function. You can add them one-at-a-time, or enter a data entry mode where you can rapidly enter a string of entries. In either case, you either type your question and answer or paste them from another source. You can add comments, categorization values, and optional key words. If you are entering multiple entries, check *the Add Another After Save* check box before clicking the *Save* button. This will remember all of the categorization values of the content you save and automatically select them for the subsequent entry. When you finish entering content from a given RFP section or within a given content category, just reselect your new values and continue.

By default, new entries will be entered ad Drafts. **Remember to submit your drafts for approval, and then approve them. Otherwise they will not be visible in search results.**

Each entry consists of:

- Question
- Response
- Comments
- Optional Key Words
- Knowledge Type *
- Category and sub-category *
- Product and version *
- Source *
- Author
- Competitive Differentiator Flag *
- Standard Content Flag *

*Note: These fields can be renamed. This allows you assign them new meanings to more closely fit your company or industry.

Try these content entry activities:

1. Add an entry by typing in your question and response.
2. Add an entry by pasting in your question and response from another doc.
3. Add multiple new entries in succession using the *Add Anther After Save* feature.
4. By default, each of your new entries will have a status of DRAFT. They will not yet show up in search results.

SUBMIT AND APPROVE

Now that you have entered a few new entries, you must submit them for approval, then approve them. By default, new entries have a status of DRAFT. Draft entries are considered to be works in progress, perhaps still needing to be edited prior to submission. After you have entered some new content, find your drafts by clicking on the *List My Drafts* link in the *Entries* menu. You can submit drafts for approval individually, in small batches, or by submitting all of your current drafts.

After you submit drafts for approval, you or another user, would then approve them to put them into circulation. Approvers may need to make additional edits prior to approval. They can also reject entries, along with a reason.

Remember, only APPROVED entries show up in search results. If you enter content and can't find it, there's a very strong chance that you forgot to submit and/or approve it. Look in the *List My Drafts* screen and/or the *Approvals* screen. Then submit or approve as needed.

Also note that you can only approve entries from Categories that list you as a valid approver. If you changed the valid approver for any category in the Filters screen, you may not have access to the pending-approval entries that you entered.

Try these submitting and approving activities:

1. Submit and Approve a single entry
    a. Click *List My Drafts* in the *Entries* menu.
    b. Now open an entry by clicking its ID number.
    c. Click *Submit* at the bottom of the screen.
    d. Click *Approvals* in the *Entries* menu.
    e. Now open your entry and click *Approve* at the bottom of the screen.
2. Submit and Approve multiple entries
    a. Click *List My Drafts* in the *Entries* menu.
    b. Tick the check box next to 2 or more drafts.
    c. Select *Submit* in the drop down at the bottom of the screen, then click *Go*.
    d. Go to the *Approvals* screen.
    e. Select 2 or more entries and select *Approve* in the drop down, then click *Go*.
3. Submit and Approve all available entries
    a. If you have already submitted and approved all of your drafts, you may want to add a few more for this exercise.
    b. List your drafts, then click *Submit All* in the menu.
    c. List your pending-approval entries, then click *Approve All* in the menu.

SEARCH

Searching for your content is the heart of RFPMonkey.com. Finding and reusing this content is the key to content reuse. You can search for a specific word or phrase, perform a relevancy-match search, or use drop-down filters to browse by category and sub_category (and other filters).

Searching for specific words or phrases is best done using the Exact Match search. It will locate content that contains an exact match to your query within the stored questions and answers.

The Relevance Match search is most useful when you copy an actual question from your current RFP and paste it into the search screen. Relevance Match works best on multi-word queries – the more language the better. Relevance match does not restrict itself to exact matches, or complete matches, and does not care what order words are found in. It searches both questions and answers.

Based on your immediate needs, you can force RFPMonkey.com to use either the *Exact* mode or *Relevance* mode. However, it's often best to leave the search mode set to *Auto*. In *Auto* mode, RFPMonkey.com will perform an Exact match search if your search phrase is 1 or 2 words. It will perform a Relevance match if your search phrase is 3 words or longer.

Once you find a piece of content that you want to use in your RFP, simply copy it from RFPMonkey and paste it into your working document.

Try these searching activities:

1. On the searching screen, click the Query button without entering any search phrase or modifying any of the drop-down filters. This will list all Approved entries.

2. Now click the entry number to the left of the listed item. This will open the entry details page.

3. Go back to the Search screen. Enter a single-word search phrase that you know is present in one or more of your entries' question and/or answer. Click Query again to see the entries that contain your search word. Repeat this search with the search mode set to Exact. Repeat it again with the search mode set to Relevance.

4. Go back to the Search screen. This time, type a question into the search phrase field that is similar to one or more of your stored entries. Make sure your question is worded consistent with how it would appear in an actual RFP. Click Query. If your search phrase is longer than 3 words, RFPMonkey.com should have performed a relevance match search for you. The most relevant responses are listed at the top of the list. Near the bottom of the list, you may find entries with very weak relevance, perhaps only matching on a single word. In the leftmost column, you will see the numerical Relevancy Rating for each entry as it relates to the current query. The relevancy rating does not appear when using the Exact Match search mode.

5. Go back to the Search screen, clear your search phrase, and make sure the search mode is set to *Auto*. Now select a Category from the appropriate drop-down filter. Click *Query* to see all approved entries within that category.

6. With category still set, now click the Sub-category drop-down and select one of the sub-categories. Clicking *Query* will narrow your search to only those entries that match both the category and sub-category you have selected. You can also filter your search results by clicking on the displayed category and sub-category values directly within the results list (providing you have chosen to display those columns. Do this in the User Preferences screen.)

WHAT HAPPENS AFTER THE POC?

WHAT HAPPENS NEXT IS YOUR CHOICE

At the end of your POC, one of three things will happen:

1. **You let us know that you would like to keep RFPMonkey and sign up for a regular account**

   In this case, we will ask you to sign up officially (it's all on-line). Then we will send you an invoice or collect your credit card information and provision your real account. If you want to keep your POC content, we can preserve it. If you want to start fresh, that's not a problem. Just let us know how you want to handle it.

2. **You let us know that RFPMonkey.com didn't meet your needs and you will not be signing up for a regular account**

   In this case, we simply delete your POC account. We both just go our separate ways. No hard feelings.

3. **You don't let us know anything at all – you go silent.**

   If you have entered a significant amount of content into your POC, we will attempt to contact you to find out which of the other two situations applies, and proceed accordingly. If we don't hear back from you on this matter, we will assume case #2 and delete your POC account.

   If you don't seem to have exercised the POC much (i.e. haven't created users and loaded content), we will assume case #2 and delete the POC account.

WHAT HAPPENS TO YOUR CONTENT?

We will either make your POC content available to you within a new paid account, or delete it (see previous section).

If you do not move to a regular account, we will NOT keep your content. We will NOT archive it for any future use/purpose. We will NOT make it available in any way to anyone else. We will NOT retain it for test data. We just delete it.

If you do move to a regular account, we can migrate your POC content into your new account if you like. However, we still do NOT use it for any internal purpose or make it available in any way to anyone else.

OTHER RESOURCES

MORE GOOD READING

This document is designed to get you into your POC and help you use it enough to evaluate it against your needs or at the very least, to help you form a list of questions/topics that we need to discuss together. If you feel this document has fallen short on that goal, please tell us. We'd love to improve the evaluation experience, and your feedback can help.

- **User Guide** – The RFPMonkey User Guide is a larger more in-depth document this this POC Guide. It describes what RFPMonkey.com is and is not, details topics important topics and tasks required to use the system, discusses selected features and functions, and includes a 'How Do I…?' section highlighting direct answers to specific questions you may have about your RFPMonkey.com account. Download the User Guide from http://www.rfpmonkey.com/downloads/RFPMonkeyUserGuide.pdf

- **Support Portal** – The RFPMonkey.com Support Portal is your access point to RFPMonkey.com documentation, training materials, application forums, and technical support. During the course of a POC, you may not need to access the Support Portal, but it's still a good idea to sign up for it and verify your Portal user account. Sign up for the Support Portal at http://www.rfpmonkey.com/support

- **Best Practices Forum** – The Best Practices Forum is within the Support Portal, but it is worth calling out separately. It has very insightful discussions about how best to use roles, Entry Aging, categorization, approvals, and RFP tracking. It's definitely worth a read.

- **Pricing Info** – If you are considering a regular paid account after your POC expires, you will want to take a look at our pricing information. It is all available on-line at http://www.rfpmonkey.com/pricing

- **RFP Software Selection Criteria Whitepaper** - The goal of this paper is to help you identify some of the key considerations when evaluating and selecting a software solution to improve your RFP quality, effectiveness, and response time. Download this whitepaper from http://www.rfpmonkey.com/whitepapers

- **RFPMonkey.com ROI Calculator -** Estimate the value of labor savings gained by using RFPMonkey.com to manage and search your custom repository of RFP knowledge. Enter your values and see if it would save enough to pay for itself. Download this calculator from http://www.rfpmonkey.com/whitepapers