

Developing an Effective Statement of Work



Jake Smithwick, PhD, MPA
Director of Education

Jake.Smithwick@uncc.edu

Download Today's Slides & Resources

center4procurement.org/mmcap/



RFP vs. SOW: How are they Related?

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

RFP vs. SOW: How are they Related?

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

5 Administrative Requirements

6 Proposal Forms

7 Attachments & Exhibits

Organizing a High-Performing RFP

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

5 Administrative Requirements

6 Proposal Forms

7 Attachments & Exhibits

What the Client
is Purchasing

Organizing a High-Performing RFP

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

5 Administrative Requirements

6 Proposal Forms

7 Attachments & Exhibits

What the Client
is Purchasing

How the Client will
Evaluate and Select
the vendor

DEFINITION: Statement of Work (SOW)

- The Statement of Work (SOW) is an essential part of any solicitation.
- Describes what you are looking to purchase, acquire, or achieve.

Terminology

All are Included...

- Statement of Work (SOW)
- Scope of Work (SOW)
- Specifications or Minimum Specifications
- Requirements or Minimum Requirements
 - Business Requirements
 - Technical Requirements
 - Functional Requirements
- Minimum Qualifications

**SOW =
What you are
Hiring the
Vendor to do**

A hand in a dark suit sleeve holds a car key with a black fob and a silver key. The background is a blurred image of a car, possibly a red one, with a blue overlay. The text 'Workshop' is in yellow and 'Purchasing a Vehicle' is in white.

Workshop

Purchasing a Vehicle

Turn to the "SOW Workshop" Handout

SOW Workshop Form

TEAM MEMBERS:

VEHICLES:

	#	MAKE	PRICE		#	MAKE	PRICE
SEDAN	1	Kia	\$14,000	TRUCK	13	Toyota	\$18,000
	2	Honda	\$16,000		14	Dodge	\$22,000
	3	Ford	\$21,000		15	Ford	\$15,000
	4	Chevy	\$23,000		16	Chevy	\$28,000
SUV	5	Honda	\$19,000	VAN	17	Kia	\$22,000
	6	Toyota	\$29,000		18	Dodge	\$24,000
	7	Dodge	\$29,000		19	Chrysler	\$25,000
	8	Chevy	\$38,000		20	Honda	\$35,000
LUXURY	9	Audi	\$35,000				
	10	BMW	\$60,000				
	11	Porsche	\$105,000				
	12	Ferrari	\$125,000				

FEEDBACK:

	SCENARIO #1	SCENARIO #2	SCENARIO #3	SCENARIO #4	SCENARIO #5	SCENARIO #6	SCENARIO #7
Vehicles Selected (#):							
Level of Satisfaction with requirements (1-10) <small>(10 = Extremely Satisfied & 1 = Extremely Dissatisfied):</small>							

SCENARIO #8

1	
2	
3	
4	
5	

CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2				5 Stars	\$105,000
	12	Ferrari	New	2			<input checked="" type="checkbox"/>		2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

Summary of Objectives

- You will play the role of a **salesperson** for a Car Dealership.
- Your task will be to identify the **'best' vehicle** for a customer based on your current inventory of vehicles.



Workshop Form

	SCENARIO #1	SCENARIO #2	SCENARIO #3	SCENARIO #4	SCENARIO #5	SCENARIO #6	SCENARIO #7
Vehicles Selected (#):							
Level of Satisfaction with requirements (1-10) (10 = Extremely Satisfied & 1 = Extremely Dissatisfied):							

SCENARIO #8

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____

Evaluation Form

TEAM MEMBERS:

VEHICLES:

SEDAN		
1	Kia	\$14,000
2	Honda	\$16,000
3	Ford	\$21,000
4	Chevy	\$23,000

TRUCK		
13	Toyota	\$18,000
14	Dodge	\$22,000
15	Ford	\$15,000
16	Chevy	\$28,000

SUV		
5	Honda	\$19,000
6	Toyota	\$29,000
7	Dodge	\$29,000
8	Chevy	\$38,000

VAN		
17	Kia	\$22,000
18	Dodge	\$24,000
19	Chrysler	\$25,000
20	Honda	\$35,000

LUXURY		
9	Audi	\$35,000
10	BMW	\$60,000
11	Porsche	\$105,000
12	Ferrari	\$125,000

FEEDBACK:

	SCENARIO #1	SCENARIO #2	SCENARIO #3	SCENARIO #4	SCENARIO #5	SCENARIO #6	SCENARIO #7
Vehicles Selected (#):							
Level of Satisfaction with requirements (1-10) (10 = Extremely Satisfied & 1 = Extremely Dissatisfied):							

SCENARIO #8

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____



SCENARIO #1

- I need to purchase a vehicle.
- What is the best deal that you can offer me?
- I will be back at the end of the week to purchase the vehicle!

CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2				5 Stars	\$105,000
	12	Ferrari	New	2			<input checked="" type="checkbox"/>		2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

OBJECTIVE: Identify the vehicle you selected for this customer

Scenario #1:

- I need to purchase a vehicle.
- What is the best deal that you can offer me?
- I will be back at the end of the week to purchase the vehicle?

Vehicles Selected (#):

Level of satisfaction with stated requirements (1-10)

(10 = Extremely Satisfied & 1 = Extremely Dissatisfied):

SCENARIO #1	

CATEGORY	MAKE	TYPE	MILEAGE	COLOR					SEATS	OPTIONS				SAFETY	MSRP
				W	B	R	S			BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	55,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4					5 Stars	\$14,000
	2	Honda	Used	60,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4					5 Stars	\$18,000
	3	Ford	New	11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4				<input type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>				5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$19,000
	6	Toyota	New	8	<input type="checkbox"/>				5	<input type="checkbox"/>			<input type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input type="checkbox"/>				7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$29,000
	8	Chevy	New	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$35,000
	10	BMW	New	12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>				5 Stars	\$60,000
	11	Porsche	New	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2					5 Stars	\$105,000
TRUCK	12	Ferrari	New	2	<input type="checkbox"/>				2					5 Stars	\$125,000
	13	Toyota	Used	74,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	<input type="checkbox"/>			<input type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input type="checkbox"/>				5 Stars	\$22,000
	15	Ford	Used	98,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input type="checkbox"/>			<input type="checkbox"/>	5 Stars	\$15,000
VAN	16	Chevy	New	24	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input type="checkbox"/>			<input type="checkbox"/>	5 Stars	\$28,000
	17	Kia	Used	47,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$22,000
	18	Dodge	New	23	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>				5 Stars	\$24,000
	19	Chrysler	New	17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$25,000
	20	Honda	New	19	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$35,000

POLL RESULTS



CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2				5 Stars	\$105,000
	12	Ferrari	New	2			<input checked="" type="checkbox"/>		2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

Most Common Feedback...

- *What does “best-deal” even mean?*
- *Open-ended SOW = free for fall, price-gauging, etc.*
- *Some teams will pick most expensive option / Others pick the cheapest*
- *Many teams are frustrated and annoyed and didn't really spend much effort?*

Clarify Assumptions...

- The Salesperson can only offer **1 vehicle**
(**cannot** offer multiple options)
- The Salesperson really wants to make the deal
 - (**would rather not 'lose' the deal** or see client purchase a vehicle from the dealer across the street)

SCENARIO #2

- Here are my expectations:
 - Need a new vehicle, not used
 - Need 5-star safety rating
 - Would like it to be black or silver
 - Would like Back-Up Camera
 - Probably an SUV (3 kids plus 2 adults)

CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2				5 Stars	\$105,000
12	Ferrari	New	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2					5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

SCENARIO #1	SCENARIO #2
Vehicles Selected (#):	
Level of satisfaction with stated requirements (1-10) (10 = Extremely Satisfied & 1 = Extremely Dissatisfied):	

POLL RESULTS



CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2				5 Stars	\$105,000
	12	Ferrari	New	2			<input checked="" type="checkbox"/>		2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

Feedback...

- **Most Common:**
 - SUV Dodge @ \$29k
 - SUV Chevy @ \$38k
 - VAN: Dodge @ \$24k
 - VAN Chrysler @ \$25k
- Which cost option **should** the dealer pick (if you can only pick one)?
- It was clearly helpful to have **more** information?
- What was **missing**?

Feedback...

- **Be clear on your expectations:**

- Need a new vehicle, not used

- Need 5-star safety rating

- Would like it to be black or silver

- Would like Back-Up Camera

- Probably an SUV (3 kids plus 2 adults)

Mandatory Requirements?

Desired Items?

SCENARIO #3

- Here are some of my expectations:

- Need a new vehicle, not used
- Need 5-star safety rating
- Do not want a red-colored vehicle
- Would like Back-Up Camera
- Need at least 5 seats (3 kids plus 2 adults)
- Must be able to go/take it camping in the forest
- My maximum budget is \$27,000

CATEGORY	MAKE	TYPE	MILEAGE	COLOR			SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R		S	BACKUP CAMERA	REMOVABLE SEATS			TOW PACKAGE
SEDAN	1	Kia	Used	59,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$19,000
	6	Toyota	New	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>			5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2				5 Stars	\$105,000
	12	Ferrari	New	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>			5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>			5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5				5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>			5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

SCENARIO #1	SCENARIO #2	SCENARIO #3
Vehicles Selected (#):		
Level of satisfaction with stated requirements (1-10) (10 = Extremely Satisfied & 1 = Extremely Dissatisfied):		

POLL RESULTS



CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2				5 Stars	\$105,000
	12	Ferrari	New	2			<input checked="" type="checkbox"/>		2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

Discussion

- Was it helpful to have the budget?
- Was it helpful to know the purpose/goals/objectives of the vehicle?

Need a new vehicle, not used

Need 5-star safety rating

Do not want a red-colored vehicle

Would like Back-Up Camera

Need at least 5 seats (3 kids plus 2 adults)

Must be able to go/take it camping in the forest

My maximum budget is \$27,000

SCENARIO #4

- Here are some of my expectations:

- Prefer a new vehicle, not used
- Would like a 5-star safety rating
- Would prefer a red vehicle
- Would prefer a sedan or SUV
- I plan to use the vehicle to take my small boat to the lake on occasion
- I generally only have 1-2 people in the vehicle, but may have a few more when going to the lake
- Do not want a van
- A maximum budget of \$75,000

CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
LUXURY	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$105,000
TRUCK	12	Ferrari	New	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$125,000
	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$22,000
VAN	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$28,000
	17	Kia	Used	47,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
VAN	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

POLL RESULTS



CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2				5 Stars	\$105,000
	12	Ferrari	New	2			<input checked="" type="checkbox"/>		2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

SCENARIO #5

- Here are some of my expectations:
 - Need a truck
 - Must be a new vehicle (not used)
 - I will be using this to tow my construction trailer
 - Must have back-up camera
 - Would prefer a lighter color (white or silver)
 - I have a maximum budget of \$20,000

CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE		
SEDAN	1	Kia	Used	59,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2				5 Stars	\$105,000
	12	Ferrari	New	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

POLL RESULTS



CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2				5 Stars	\$105,000
	12	Ferrari	New	2			<input checked="" type="checkbox"/>		2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

Discussion

- **Does client have enough money to meet all expectations?**
- **What are the options?**
- **What would happen if you didn't release the budget?**

SCENARIO #6

- Here are some of my expectations:
 - Must be a Nissan Truck
 - Must have a tow package
 - Must have back-up camera
 - Must be white
 - I have a maximum budget of \$30,000

CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2				5 Stars	\$105,000
12	Ferrari	New	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2					5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

POLL RESULTS



CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2				5 Stars	\$105,000
	12	Ferrari	New	2			<input checked="" type="checkbox"/>		2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

Discussion

- **Would this be acceptable in Public Procurement?**
- **Cannot specify a product (unless there is clear justification), must allow “or-equal”**

SCENARIO #7

- **I need to purchase a vehicle. I would like you to identify the best deal you can provide for a vehicle? Here are some of my expectations:**

- The vehicle must come with synthetic engine oil
- The vehicle must have windshield wipers
- I was born in May
- I have 3 younger brothers
- My brothers live in the same State
- I work for an IT company
- I would like a new car, not used
- I generally work 40-45 hours per week
- I really like my current vehicle
- I get headaches from the smell of cigarettes
- Do you think I need a tow package
- My house has really cool carpet
- I do not want a red or yellow vehicle
- I have set aside extra funds for the 'right' vehicle
- Vehicle must have a 4-speed automatic or better
- The vehicle should get great MPG
- Vehicle must come with 2 sets of keys
- Vehicle must come with full tank of gas
- I am open to any color vehicle
- I've never been camping
- How do you take a shower in the forest?
- If I get a vehicle, is 5-star better than 4?
- Would like to purchase by end of the week
- Would really like a luxury sedan
- I think SUV's are really cool
- I currently drive a 4-door sedan
- I really like Thai food, but not sushi
- My maximum budget is \$29,000
- The vehicle must have Firestone tires
- The vehicle should have chrome wheels
- Would like the vehicle to have tinted windows
- The vehicle must have great lights for night driving

POLL RESULTS



Discrepancies

- I need to purchase a vehicle. I would like you to identify the best deal you can provide for a vehicle? Here are some of my expectations:

- The vehicle must come with synthetic engine oil
- The vehicle must have windshield wipers
- I was born in May
- I have 3 younger brothers
- My brothers live in the same State
- I work for an IT company
- I would like a new car, not used
- I generally work 40-45 hours per week
- I really like my current vehicle
- I get headaches from the smell of cigarettes
- Do you think I need a tow package
- My house has really cool carpet
- I do not want a red or yellow vehicle
- I have set aside extra funds for the 'right' vehicle
- Vehicle must have a 4-speed automatic or better
- The vehicle should get great MPG
- Vehicle must come with 2 sets of keys
- Vehicle must come with full tank of gas
- I am open to any color vehicle
- I've never been camping
- How do you take a shower in the forest?
- If I get a vehicle, is 5-star better than 4?
- Would like to purchase by end of the week
- Would really like a luxury sedan
- I think SUV's are really cool
- I currently drive a 4-door sedan
- I really like Thai food, but not sushi
- My maximum budget is \$29,000
- The vehicle must have Firestone tires
- The vehicle should have chrome wheels
- Would like the vehicle to have tinted windows
- The vehicle must have great lights for night driving

Discrepancies

- I need to purchase a vehicle. I would like you to identify the best deal you can provide for a vehicle? Here are some of my expectations:

- The vehicle must come with synthetic engine oil
- The vehicle must have windshield wipers
- I was born in May
- I have 3 younger brothers
- My brothers live in the same State
- I work for an IT company
- I would like a new car, not used
- I generally work 40-45 hours per week
- I really like my current vehicle
- I get headaches from the smell of cigarettes
- Do you think I need a tow package
- My house has really cool carpet
- I do not want a red or yellow vehicle
- I have set aside extra funds for the 'right' vehicle
- Vehicle must have a 4-speed automatic or better
- The vehicle should get great MPG
- Vehicle must come with 2 sets of keys
- Vehicle must come with full tank of gas
- I am open to any color vehicle
- I've never been camping
- How do you take a shower in the forest?
- If I get a vehicle, is 5-star better than 4?
- Would like to purchase by end of the week
- Would really like a luxury sedan
- I think SUV's are really cool
- I currently drive a 4-door sedan
- I really like Thai food, but not sushi
- My maximum budget is \$29,000
- The vehicle must have Firestone tires
- The vehicle should have chrome wheels
- Would like the vehicle to have tinted windows
- The vehicle must have great lights for night driving

Discussion

- **Is providing more information in the Statement always better?**
- **What happens if your requirements accidentally conflict?**

General Feedback...

Most common requests from the Dealerships:

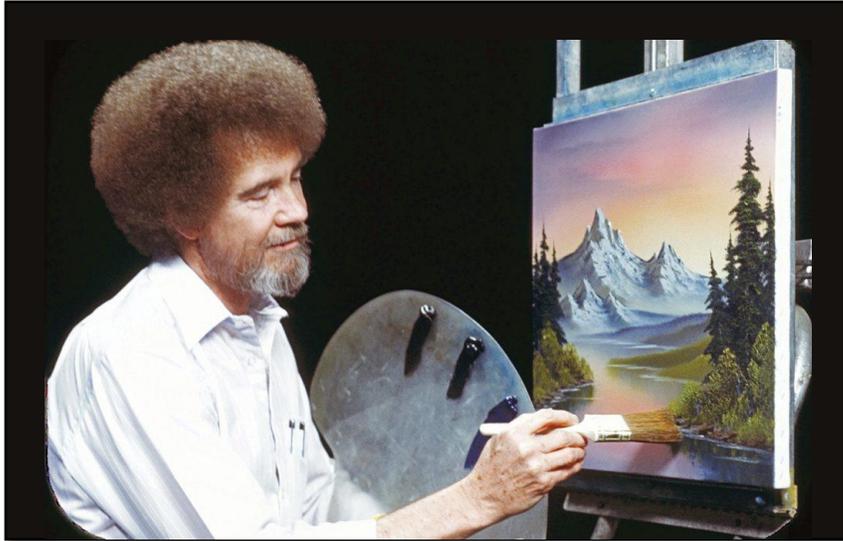
- **Budget**
- **Schedule**
- **Background about intended use or purpose (family, luxury, work truck, etc.)**
- **Technical requirements**

Key Takeaways

Common Responses...

- Quality of Statement impacts level of **vendor frustration/satisfaction**
- Quality of Statement impacts how much **time & effort** vendors spend
- **Budget** is critical
- **Purpose** is just as important as technical specs
- **Not enough** information can frustrate vendors
- **Too much** information can be just as bad
- All you need is for one vendor to be **honest**, to get the best deal

The Goal of the SOW



- Paint the picture of what success looks like
- Describe what it will take to make you 100% satisfied (what are the outcomes & achievements)
- A good SOW assures that all of the vendors propose a proper solution (that meets your needs)

Content & Structure of a High-Performing Statement of Work

Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose
- 2 Future State
- 3 Itemized Requirements
- 4 Schedule & Budget
- 5 Unique Considerations

Important in all areas of the SOW + CC

1
Clear &
Concise

2
Accurate

3
Complete

Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose**
- 2 Future State
- 3 Itemized Requirements
- 4 Schedule & Budget
- 5 Unique Considerations

**Concisely Describe
“What” & “Why”**

Content & Structure of a High-Performing SOW

Overview & Purpose

- Project Overview: high-level summary that is easily understandable
(1-2 sentences up to 1-2 paragraphs max)

Content & Structure of a High-Performing SOW

Overview & Purpose

- Project Overview: high-level summary that is easily understandable (1-2 sentences up to 1-2 paragraphs max)
 - Avoid technical language, jargon, details, or specifics.

Content & Structure of a High-Performing SOW

Overview & Purpose

- Project Overview: high-level summary that is easily understandable (1-2 sentences up to 1-2 paragraphs max)
 - Avoid technical language, jargon, details, or specifics.

- Goals, Objectives & Motivation: primary business drivers and purpose

Goals or Objectives

- Install a new shingles on my roof...or waterproof my building?



Content & Structure of a High-Performing SOW

Overview & Purpose

- Project Overview: high-level summary that is easily understandable (1-2 sentences up to 1-2 paragraphs max)
 - Avoid technical language, jargon, details, or specifics.
- Goals, Objectives & Motivation: primary business drivers and purpose
- Key Measures of Success: top 3-5 quantifiable metrics (cost, time, quality, functionality)

Key Measures of Success

- Key Measures of Success: top 3-5 quantifiable metrics (cost, time, quality, functionality)
- Difficult for Business Units to do!
 - They often focus on activities rather than outcomes.
 - Takes intense questioning.

Organizing a High-Performing RFP

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

5 Administrative Requirements

6 Proposal Forms

7 Attachments & Exhibits

What the Client
is Purchasing

Overview &
Purpose are right
up front, so must
be easy to find &
understand!

Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose
- 2 Future State**
- 3 Itemized Requirements
- 4 Schedule & Budget
- 5 Unique Considerations

**Departures from
Current Conditions**

Content & Structure of a High-Performing SOW

Future State

- Describe each of the deliverables/services to be provided by the selected vendor for this Statement of work
- Describe the minimum requirements that must be performed to achieve a 100% satisfaction
- Attach exhibits to make this easier to follow (i.e. drawings, specs, pictures, site plans, etc.)

Content & Structure of a High-Performing SOW

Future State

- Overview: clear, concise, & easily understandable description
- Project Deliverables: tangible outcomes to be produced by vendor
- Figures, Diagrams, & References: supporting explanation
- Transition/Migration: efforts to bring legacy data forward

Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose
- 2 Future State
- 3 Itemized Requirements**
- 4 Schedule & Budget
- 5 Unique Considerations

**Mandatory & Desired
Items**

Content & Structure of a High-Performing SOW

Itemized Requirements

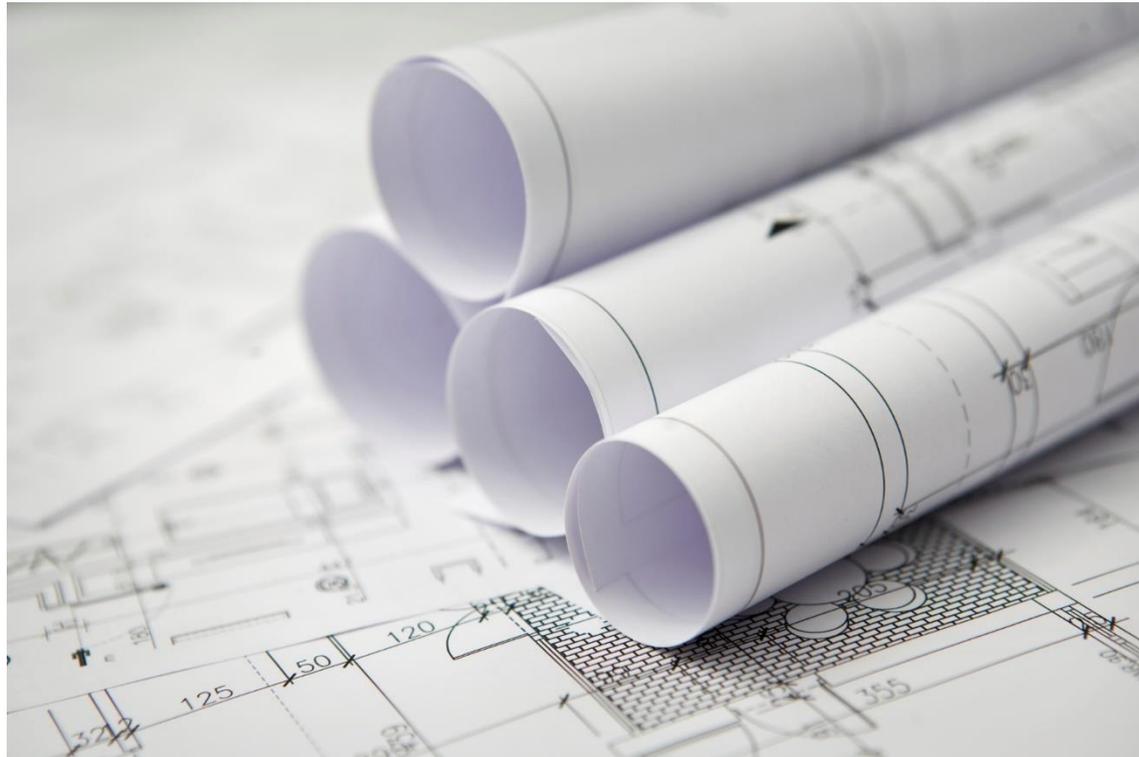
Organization:

- Itemized
- Organized into major categories
- Attach (and reference) Exhibits to make this easier to follow (i.e. drawings, specs, pictures, diagrams, site plans, reference files, etc.)
- Do NOT need a written commentary for each requirement

Content & Structure of a High-Performing SOW

Itemized Requirements

- Drawings & Specs (Construction)



- Requirements (IT/Software)

ID Num	Requirement Area	Requirement Subcategory	Requirement Name	Requirement
5402	System and Technical	Workflow	Approval / Denial	System shall provide ability to define multiple approval levels for electronic transactions / documents / business events processing.
5403	System and Technical	Workflow	Approval / Denial	System shall provide ability to restrict processing of electronic transactions / documents / business events until they pass all required approval levels.
5404	System and Technical	Workflow	Approval / Denial	System shall provide ability to set up Approver Groups associated with electronic transaction / document / business event processing.
5405	System and Technical	Workflow	Approval / Denial	System shall provide the ability to define a unique approval process for each user and type of document/business event.
5406	System and Technical	Workflow	Approval / Denial	System shall provide the ability to specify multiple approvers for a document/business event where only one of the approvers listed must approve the document in order to consider the document approved.
5407	System and Technical	Workflow	Audit Trail	System shall provide an audit trail of all adds, changes, and deletes to workflow rules.
5408	System and Technical	Workflow	General	System shall ensure that any transaction, document or business event entered into the on-line system is reviewable prior to its saving / processing / commitment.
5409	System and Technical	Workflow	General	System shall provide the ability to reverse / unwind processed transactions, documents and business events.
5410	System and Technical	Workflow	General	System shall permit a minimum of 10 levels of approval that may be established for each type of electronic document/business event.
5411	System and Technical	Workflow	General	System shall allow all authorized users to see the approval status of a document/business event.
5412	System and Technical	Workflow	General	System shall assure that an employee is removed from and added to the workflow process based on qualifying events (e.g., termination from or appointment to agency, or transfer to another organization entity within the agency).
5413	System and Technical	Workflow	General	If a user modifies an electronic document/business event, the system shall allow approvals to be reprocessed in accordance with business rules.
5414	System and Technical	Workflow	General	System shall provide the ability to search/retrieve documents/records based upon user defined criteria.
5415	System and Technical	Workflow	Notification	System shall include a workflow process, with notification options, for business events and documents.
5416	System and Technical	Workflow	Notification	System shall provide the ability to re-route transaction/document/business event for approval based upon user defined criteria such as dollar thresholds or random selection for statistical sampling purposes.
5417	System and Technical	Workflow	Notification	System electronic document management function shall be integrated with the State's electronic mail system or provide other means to alert "reviewer" of documents awaiting approval.
5418	System and Technical	Workflow	Tracking Document(s)	System shall provide ability to track (e.g., identify, record, inquire, report) the progress of electronic transactions / documents / business events.

Content & Structure of a High-Performing SOW

Itemized Requirements

- Mandatory Requirements (minimum, pass/fail):
 - vendors **MUST** meet these or be disqualified.
itemized, organized, and categorized
- Desired Requirements (value proposition):
 - vendors **NOT disqualified** for missing any individual item.
 - But the Client's goal is to achieve as many as possible.
itemized, organized, and categorized

Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose
- 2 Future State
- 3 Itemized Requirements
- 4 Schedule & Budget**
- 5 Unique Considerations

**Time & Financial
Constraints**

Content & Structure of a High-Performing SOW

Schedule & Budget

- Schedule: clear & transparent identification of timing needs and constraints
- Budget: clear & transparent identification of financial needs and constraints

Should We Share the Budget?

YES

Handout: The Budget

To Share or Not to Share? That is the Question!

The Budget

To Share or Not to Share? That is the Question!

Our recommendation

If your project has a budget, share it. Put it right into the RFP/solicitation docs. Not a budget range or approximation, but the actual budget. The amount of money you, as the client, actually have that you can actually spend. No tricks, no hidden contingency, but the actual number, raw and exposed. Let the vendors know how much money you have...

Share your budget

...but of course, you have to do this in the **right way**, and with the **right procurement process**, and with the **right training** for both your project team AND especially the proposing vendors.



Nevertheless, you may be thinking right now: "Share my budget? That's crazy talk!" Let us explain.

First, some context

Initially, the big fear most clients have in sharing their budget is: "Won't vendors artificially raise their prices to meet my budget? They'll turn my money into their profit!" But first ask yourself this: "How often do I have more money than I need? How often is my budget bigger than my scope?"

For most organizations the answer is almost always Never. But it does happen sometimes, so let's say that on 5% of your projects your budget isn't "tight." This means that 95% of projects have tight budgets, essentially more scope than budget. When this occurs, you are asking vendors for more scope than you are able to afford.

For those times when the budget is tight, let's look at both options:

The 95% of Projects



Option 1 What happens if I don't share the budget?

Problem #1:
The budget is commonly the single biggest risk to the project. If it is not shared, your high performing vendors cannot use their expertise to help you minimize your biggest risk.

Problem #2:
Withholding your budget, gives low performers an advantage. A low performer's only competitive advantage is that they're cheap (initially).

Taking the biggest risk out of consideration in your evaluations makes it more difficult for high performers to differentiate themselves and easier for lower performers to look more attractive. A "good deal" may just be the beginning of problems on your project.

Problem #3:
If the prices come in too high, it causes frustration, the blame-game, the potential of canceling the project, etc.

It can lead to inappropriate scope shaving, "value-engineering," and aggressive negotiating. These all cause inefficiency and waste additional time & effort.

Advantage:
The advantage is we don't have to worry about price gouging from vendors. But if you don't have enough money to begin with, this potential advantage doesn't exist.

Option 2 Benefits to Sharing the Budget

Advantage #1:
High performing vendors can use their expertise to help you minimize your budget risk within their proposals. This may come in the form of cost-saving ideas, innovative scope alternatives, etc. It makes the proposals more valuable & your interviews more productive.

Advantage #2:
It is easier for high performers to differentiate themselves in your evaluation process. High performing vendors can use their expertise to provide cost-savings and value-adding innovations. Any such ideas that are contained within a proposal will inherently need to be specific to your project. Thus, it even helps minimize the boilerplate nature of many proposals.

Advantage #3:
It helps the vendors better understand the intent of your scope and purpose. A scope with a budget not only defines the needs and desires of the client, it does so within the framework of their constraints and resources.

Advantage #4:
If your evaluations are set up properly, vendors can explain, in detail, why your budget and their estimated pricing differ.

Often, client project teams are under pressure to make a project happen, even when the project team feels the budget is inadequate. They try to convince their superiors that the budget is wrong, but often to no avail. The evaluation process can be used to help clarify reality and provide the project team with more, and better, cost information that can be used in discussions with supervisors and executives.

Problem:
If you share your budget, and you have more money than you need, vendors may raise their prices up to your budget. But if 95% of the time you are tight on money, then this risk is not a possibility... it is largely imaginary.

In our experience, there are more advantages to sharing the budget.

The other 5% of Projects

If you share your budget and you do have more money than you need, then price gouging is now an actual possibility. The good thing is that it just takes one honest vendor to keep the competition in check. In other words, it only takes one vendor to submit a fair and realistic price to negate ALL potential price gouging of other vendors. Vendors know this and rarely artificially raise their prices based upon a client's budget. They are more likely to raise prices based upon perceived risk and how badly their company needs the work.

Vendors are always looking to gain evaluation points everywhere they can, which means a lower price. Price is still heavily weighted in Simplar's XPD selection process with additional cost controls and protections in place. You will never get "burned" on price if you run the right procurement process. In any solicitation process, it is optimal to share your budget 100% of the time.



The Reality

There is no real risk in sharing your budget. Only perceived risk. We recommend always sharing your project budget and using XPD.

The Simplar XPD approach gets you faster procurements, more competition, higher performance, and better project and service outcomes.

Sharing the budget is just one concept that the best clients use to get the best vendors with the best pricing. Simplar helps your organization become a "Client of Choice."

Content & Structure of a High-Performing SOW

Schedule & Budget

- The Budget is crucial (one of the most important SOW elements)
- Clarifies your technical Statement (what you can afford)
- Clearly define any financial constraints or expectations that you have (**not ranges or “fuzzy” information → don’t cause confusion!**)
- Be direct, such as:
 - The construction budget for this Project is \$150,000
 - The estimated spend for this Project is \$2 Million
 - The project budget is \$3,000,000 over 5 years, of which \$500,000 is allocated for implementation and \$500,000 for annual subscription/support.
- (same for Schedule expectations, constraints, critical dates, phasing, etc.)

Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose
- 2 Future State
- 3 Itemized Requirements
- 4 Schedule & Budget
- 5 Unique Considerations**

**Supplemental
Information**

Content & Structure of a High-Performing SOW

Unique Considerations

- Unique: what may be unusual in your environment?
(vs. the vendor's other clients)
- Unknowns & Assumptions: list any conditions that are unknown or assumed
- Attachments & Exhibits: pertinent supplemental information

Keep in Mind...

Goal Is Not Perfection!



***Goal Is Not
Perfection!***



***Do Our Best
Within Resource
Constraints***



***...But We
Can't Totally
Miss The
Target!!!***

Balancing Act:

Too Open-Ended

VS.

Overly Prescriptive

Waste Hauling SOW



5,000+ tons of medical waste collection across urban area

- “An adequate fleet of collection vehicles should be used and maintained by the Vendor...”
- “It is the [Owner’s] expectation that collection vehicles designated for service should at a minimum be less than two years old at the start of the contract”

Waste Hauling SOW



5,000+ tons of medical waste collection across urban area

- “In order to support accurate measurements towards the [Client’s] sustainability goals, all vehicles must be solely dedicated to [the Client] and cannot be used for other sites.”

Waste Hauling SOW



5,000+ tons of waste collection across urban area

- Average Proposal Price: +46% over the Budget
- Maximum Proposal Price: +106% Over the Budget

- SOW was put together with great intentions
 - Seeking high quality services & impressive sustainability goals.

- Over-emphasis on the inputs (restricting vendor means & methods) can detract from the outcomes (results)!

Impact of a Poor SOW

Perceptions of Owner SOWs

- **Unclear**
- **Information is missing**
- **Overly prescriptive**
- **Unrealistic**
- **Discourages innovation**
- **The owner is “fishing”**
- **Misunderstands Needs**
- *Procurement is Not Fair*



Impact

- **Fewer proposals**
- **Low quality proposals**
- **Less qualified teams**
- **Less competitive pricing**
- **Less consistent pricing**
- **Open to interpretation**
- **Have to believe the vendor**
- *Brings Risk to the Project*

What is a High Performing SOW?

Core Objective: What would a High-Performing Vendor need (or want) to know?

ALWAYS question whether the SOW....

- Allows vendors to provide the **best price?**
- Gives vendors **information to plan** their approach?
- Enables vendors to **minimize contingency?**
- Prevents vendors from **walking away?**

Foundations of a High-Performing SOW

- **Apples-to-Apples:** clear & reasonable proposal benchmark
- **Current Conditions:** align expectations on the starting point
- **Realistic:** understand the norms of industry structure
- **Clear, Concise, Complete:** comprehensively describe needs
- **Not Perfect:** High-Performing does not mean Flawless

Inmate Health Services

- **Scope of Work:** Provide health services to correctional offenders (13 facilities – approximately 5,000 offenders).
- **Length of Contract:** 3-Year Base Contract (opportunity for 5 total years)
- **Budget Constraints:** \$25M / year
- **Politics:** Owner extremely dissatisfied with the incumbent

Analysis of Proposals

NO	CRITERIA	FIRM A	FIRM B	FIRM C	FIRM D	FIRM E
1	Total Cost	\$ 85,567,680	\$ 66,786,240	\$ 83,710,560	\$ 66,488,400	\$ 65,840,160
2	Interview	4.0	6.9	6.9	4.5	2.2
3	Risk & Value Plan	4.8	6.4	6.6	5.4	3.8
4	Work Plan	6.0	5.0	7.4	4.2	4.6
5	PPI Scores (1-10)	9.6	9.8	9.8	9.8	9.2
6	PPI Scores (#)	26	40	28	32	20
Overall Score (1,000):		709	953	951	779	601

■ Awarded Vendor was:

- **2.8% below** the IDOC's budget; **9.4% below** average of all proposals
- Highest Interview
- Highest Work Plan
- Second highest Risk Plan

Moving Into Clarifications

- The vendor was unaware of clients concerns with their company
- They assumed that the client was very satisfied with their past performance.
- The client put together a list of their major 'deal-breakers' or issues that were causing them significant displeasure in the past. These included:
 - Incumbents ability to staff the service properly (high turnover issues)
 - Lack of clear and understandable performance metrics
 - Incumbents inability to manage the service adequately

Vendor Reaction

- Very traditional (used vague language / didn't clearly address the issues)
- Did not acknowledge the real issues
- Did not provide an actual plan that showed how they would act differently
- Vendor transfers decision making back to the client (“what exactly would you like us to do” “how would you like us to handle this”)

How Do We Address These Issues?

Quick Survey

- Our team conducted a third-party survey with the client staff
- Identify their overall satisfaction with
 - The vendor
 - The vendor's management
 - The client
- Primary Goal: Determine if there is a problem or not!
- Within a couple of days, a survey was created and sent out to all employees.
- No names, setup online for a quick response.

Survey Results

- Within a week, we received 83 surveys (out of 128) from 9 different facilities

NO	CRITERIA	RESULTS
1	Overall Job Satisfaction (10 max)	6.8
2	Satisfaction of the Client (10 max)	7.3
3	Satisfaction of the Regional Manager (10 max)	3.7
4	Satisfaction with Corporate Support (10 max)	4.5
5	Total Number of Responses	83

- Results confirmed that there was a significant weakness with staff satisfaction towards corporate support and regional manager

Do We Really Have An Issue?

- Surveyed 4 other institutions nationwide (similar in size)
- Metrics can be used to identify any potential strengths and weaknesses

NO	CRITERIA	UNIT	OVERALL	CLIENT A	CLIENT B	CLIENT C	CLIENT D	CLIENT E
1	Overall Satisfaction - Job	(1-10)	7.0	6.8	7.5	6.9	7.0	6.4
2	Overall Satisfaction - Job Training	(1-10)	6.1	6.0	6.8	6.2	4.9	5.7
3	Overall Satisfaction - Pay / Benefits / Comp	(1-10)	6.3	6.5	7.1	6.2	5.6	5.6
4	Overall Satisfaction - Site Management Team	(1-10)	6.7	7.2	8.2	6.3	6.0	5.6
5	Overall Satisfaction - Regional Manager	(1-10)	6.2	3.7	8.1	6.3	5.9	6.1
6	Overall Satisfaction - Corporate Management	(1-10)	6.1	4.5	7.6	6.0	5.5	5.5
7	Overall Satisfaction - Client	(1-10)	7.4	7.3	7.7	7.3	7.2	7.5
8	Total Number of Responses	#	525	83	138	159	58	87
9	Percent of Surveys Returned	%	44%	65%	66%	36%	32%	37%

FINAL THOUGHTS

- **A good Statement of Work is CRUCIAL to being seen as a client of choice**
- **Provide your budget!!!**
- **Procurement can provide leadership and facilitation skills in a way that most other groups cannot**

Want today's
Presentation?

White papers?

Toolkits?

Templates?

center4procurement.org/mmcap/



Free Webinar Series

3rd Thursdays every month

@ 12pm Central

15-min Teaching Moment

(learn a new tip, trick, or tool)

30-min Virtual Peer Group

(network with professionals)

Office Hours

(open Q&A until the questions run out!)



We can help

- **On-site training procurement workshops**
- **Project support (RFP & SOW development, evaluation training, financial analysis)**
- **Project partnering & clarification**
- **Healthcare facility benchmarking (maintenance, environmental services costings, planning horizons)**

Jake.Smithwick@uncc.edu