Toolkit: RFP for an Analytics and Business Intelligence Platform

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James Richardson

Initiatives: Analytics, BI and Data Science Solutions

Data and analytics leaders should use this customizable request for proposal template and questionnaire to define and prioritize required capabilities before selecting a modern analytics and BI platform vendor.

When to Use

This toolkit relates to analytics and business intelligence (BI) platforms (see Magic Quadrant for Analytics and BI Platforms). Organizations can use this toolkit to select the right analytics and BI platform vendor for one or more use cases. Organizations also may use this to rationalize the utilization of a number of analytics and BI products across use cases based on their capabilities.

Before issuing a request for proposal (RFP), modify the attached template to reflect your organization's specific requirements. In addition to information gathering, it is recommended to conduct hands-on proofs of concept (POCs) and/or require vendors to follow scripted demos to prioritize requirements and determine which vendor's product is the best fit (see our webinar, BuySmart: BI Bake-Off for examples of scripted demos).

In particular, modify the questionnaire items about the functional requirements for analytics and BI platforms by adding or deleting questions and adjusting the weightings for each capability. The questionnaire is not meant to be an exhaustive list of functions for modern analytics and BI platforms, but it does represent the capabilities that are most critical for buyers to consider when evaluating modern platform options (see Critical Capabilities for Analytics and BI Platforms). Please note, this does mean capabilities we deem to be expected or universally common across tools (e.g., the ability to create basic chart types such as bar/column, line/area or pie charts) are no longer explicitly included in the questionnaire, but they can be added manually by users of the toolkit.
**Table 1: RFP Resources**

<table>
<thead>
<tr>
<th>Tool</th>
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<td>RFP Questionnaire</td>
<td>This Microsoft Excel questionnaire can be used by internal stakeholders either to score vendors on their capabilities based on internal usage and POCs or to gather input from vendors being considered for analytics and BI deployments. Use the columns in the spreadsheet to apply weights and scores to each capability based on the responses from each vendor and the experience when using trial versions. Use the aggregated scores to assess strengths and weaknesses for all the vendors being considered to ensure you select the new platform, or align an existing one, best-suited to your organization’s needs.</td>
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Source: Gartner (2021)

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**Recommended by the Authors**

- Magic Quadrant for Analytics and Business Intelligence Platforms
- Critical Capabilities for Analytics and Business Intelligence Platforms

**Document Revision History**

- Toolkit: RFP for an Analytics and Business Intelligence Platform - 1 May 2020
- Toolkit: RFP for an Analytics and Business Intelligence Platform - 9 July 2019
- Toolkit: Analytics and BI Platform RFP - 12 July 2018
- Toolkit: BI and Analytics Platform RFP - 7 December 2016
- Toolkit: BI and Analytics Platform RFP - 17 November 2015
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