REQUEST FOR PROPOSAL - TEMPLATE

OneTrust Third-Party Risk Implementation Services

Prepared with the cxpartners.co RFP Advisor - cxpartners.co/rfp

How to use this template: replace every blue [Your input] placeholder with your details, delete sections that do not apply, and keep the evaluation model consistent across all vendors. For an AI-drafted RFP written from your specific requirements, use the RFP Advisor at cxpartners.co/rfp.

1. Introduction & Company Background

Provide a concise description of your organization: industry, size, markets served and digital maturity. State why this project is being initiated now and name the executive sponsor.

[Your input: 2-3 paragraphs about your company and the trigger for this initiative]

2. Project Overview & Business Objectives

Summarize the engagement and define the business outcomes that will determine success. Express objectives as measurable results (e.g., conversion uplift, time-to-market reduction, cost consolidation) rather than activities.

[Your input: 3-5 measurable objectives with current baselines where known]

3. Current Environment

Describe your existing technology landscape: platform products licensed, CMS, CRM, data warehouse, tag management, identity providers and known pain points. Disclose known issues honestly - vendors price uncertainty.

[Your input: current stack inventory and known constraints]

4. Scope of Work

This RFP covers implementation, migration or optimization of OneTrust Third-Party Risk, including solution design, integrations, data migration and team enablement. The following work streams are in scope:

- Discovery and solution design for OneTrust Third-Party Risk aligned to your business objectives
- Configuration and build of OneTrust Third-Party Risk to match your processes and data model
- Integration with your existing stack (CRM, data warehouse, analytics, identity)
- Data migration, validation and reconciliation into OneTrust Third-Party Risk
- Testing, UAT and go-live hypercare
- Admin and end-user training, documentation and knowledge transfer

5. Functional & Technical Requirements

Vendors must respond to each requirement individually, referencing evidence from delivered work:

1. Describe your recommended OneTrust Third-Party Risk implementation approach for an organization like ours and the reasoning behind it
2. Detail your integration approach for connecting OneTrust Third-Party Risk to our existing systems, including data-flow direction and real-time vs batch expectations
3. Explain your data migration methodology, including validation and acceptance criteria
4. Describe your testing, QA and hypercare process before and immediately after go-live
5. Outline the security, compliance and governance controls you implement for OneTrust Third-Party Risk
6. List the named team members proposed and their OneTrust Third-Party Risk certifications and delivery history

6. Integrations

List the systems the solution must integrate with (CRM, ERP, data warehouse, identity, service desk), the direction of data flow and any existing middleware. Note real-time versus batch expectations per integration.

[Your input: integration inventory with owners and data-flow direction]

7. Migration & Data

Describe content, data or platform migrations in scope, expected volumes and quality of source data. State your expectations for migration tooling, validation and acceptance criteria.

[Your input: migration scope, volumes and acceptance criteria]

8. Team & Resource Requirements

State expectations for the vendor team: named key roles, certification expectations, onshore/offshore mix, language requirements and time-zone overlap. Require CVs for named individuals and key-person continuity terms.

9. Timeline & Milestones

Provide your target start date, immovable business dates and expected phasing. Ask vendors to propose a realistic plan with milestones, dependencies and decision gates rather than confirming your dates unexamined.

[Your input: target dates and constraints]

10. Security & Compliance

State applicable requirements: data protection regulations (e.g., GDPR, CCPA), industry standards (e.g., SOC 2, ISO 27001), data residency, accessibility (WCAG) and your security review process for vendors.

[Your input: compliance requirements and review gates]

11. Support & Service Levels

Describe post-launch expectations: hypercare duration, ongoing support scope, response/resolution SLAs by severity, and how enhancements will be governed after go-live.

12. Evaluation Criteria

Responses will be scored against weighted criteria. We recommend, and will apply, the following model:

1. Relevant delivery experience - 25%
2. Proposed team and named individuals - 20%
3. Approach and methodology - 20%
4. Price and commercial terms - 15%
5. Cultural and operating fit - 10%
6. Timeline realism - 10%

Each evaluator scores independently before panel consolidation.

13. Proposal Response Format

To keep responses comparable, submit proposals with these sections in order: executive summary; relevant experience with references; named team and CVs; delivery approach and plan; assumptions and dependencies; itemized pricing (one-time and recurring); support model; contractual terms. Maximum 25 pages excluding CVs.

14. Submission Process & Timeline

State your process dates: question deadline, answer publication, proposal deadline, shortlist presentations and decision date. Name a single contact for questions and commit to sharing all Q&A with all bidders.

[Your input: process dates and RFP contact]