

Request for Proposal (RFP): Corporate Performance

Management (CPM) Software Solution

Table of Contents

1. Introduction
2. Company Background
3. Project Objectives
4. Technical Requirements
5. Functional Requirements
6. AI and Machine Learning Capabilities
7. Implementation and Support
8. Pricing Structure
9. Vendor Information
10. Evaluation Criteria
11. Submission Instructions
12. RFP Timeline

1. Introduction

This Request for Proposal (RFP) is issued to select a robust Corporate Performance Management (CPM) software solution that will enhance our organization's ability to monitor, manage, and optimize business performance across all departments.

2. Company Background

[To be completed by the issuing organization with:

- Organization description
- Industry details

- Company size
- Current systems
- Specific needs]

3. Project Objectives

Our primary objectives for implementing a CPM solution are:

- 3.1. Implement a comprehensive CPM solution to streamline performance management processes
- 3.2. Enhance strategic planning and execution capabilities
- 3.3. Improve forecasting and budgeting accuracy
- 3.4. Facilitate real-time performance monitoring and analysis
- 3.5. Ensure data consistency and integrity across the organization

4. Technical Requirements

4.1 Hardware Requirements

Server Specifications:

- Processor: Multi-core processor (Intel Core i5 or higher)
- RAM: Minimum 8 GB, preferably 16 GB or more for larger organizations
- Storage: At least 100 GB available disk space, SSDs preferred

Client Specifications:

- Processor: Dual-core processors
- RAM: Minimum 4 GB
- Storage: Sufficient for local installations and temporary files

4.2 Software Requirements

- Operating System compatibility:
 - Windows Server (Windows Server 2016 or later)
 - Linux distributions (Ubuntu, CentOS)
- Database Management System (DBMS):
 - Compatible with Microsoft SQL Server, Oracle Database, or MySQL

- Version requirements to be specified
- Web Browser Compatibility:
 - Support for modern browsers (Google Chrome, Mozilla Firefox, Microsoft Edge)

4.3 Network Requirements

- Internet Connection:
 - Stable and high-speed internet connection for cloud-based solutions
 - Minimum bandwidth specifications
- Network Configuration:
 - Proper firewall settings
 - VPN configurations for secure data transmission
 - Security protocols implementation

4.4 Integration Requirements

- APIs and Middleware:
 - Integration with existing systems (ERP, CRM, etc.)
 - REST API availability
 - SOAP API support where needed
 - Custom API development capabilities

4.5 Security Requirements

- Authentication:
 - Multi-factor authentication
 - Single sign-on (SSO) capabilities
 - Active Directory integration
- Data Security:

- End-to-end encryption
- Data encryption at rest
- Secure data transmission protocols
- Compliance:
 - GDPR compliance
 - HIPAA compliance
 - SOC 2 certification

5. Functional Requirements

5.1 Goal Setting and Objective Management

Tip: Essential for organizational alignment and performance tracking, this module should enable clear communication of objectives across all levels while providing tools for measurement, tracking, and adjustment of goals. The system must support both top-down and bottom-up goal setting approaches while maintaining strategic alignment throughout the organization.

Requirement	Sub-Requirement	Y/N	Notes
Goal Definition	Define corporate goals organization-wide		
	Create measurable objectives		
	Set realistic performance targets		
Goal Alignment	Align department goals with corporate strategy		
	Map dependencies between objectives		
Goal Management	Categorize objectives by priority		
	Track goal progress in real-time		
	Adjust goals based on performance data		

5.2 Strategic Planning Tools

Tip: Strategic planning functionality must support comprehensive long-term planning while maintaining flexibility for market changes. The system should integrate scenario planning, resource allocation, and risk assessment capabilities while enabling regular plan updates and performance tracking against strategic objectives.

Requirement	Sub-Requirement	Y/N	Notes
Long-term Planning	Support merger planning		
	Support acquisition planning		
	Support expansion planning		
Plan Development	Create strategic plans		
	Adjust plans based on feedback		
	Link plans to objectives		
Resource Management	Allocate resources effectively		
	Track resource utilization		
Risk Assessment	Identify potential risks		
	Evaluate risk impact		
	Monitor risk mitigation		

5.3 Forecasting and Budgeting

Tip: Integrate advanced forecasting capabilities with comprehensive budgeting tools to enable accurate financial planning and monitoring. The system should support multiple forecasting methodologies while providing flexible budgeting capabilities that can adapt to changing business conditions and organizational structures.

Requirement	Sub-Requirement	Y/N	Notes
Multi-source Analysis	Integrate data from multiple sources		

	Predict future costs and revenues		
	Process historical trends		
Budget Creation	Create aligned corporate budgets		
	Enable departmental budgeting		
	Support multi-currency budgeting		
Scenario Planning	Perform what-if analysis		
	Create multiple forecast scenarios		
	Model different business conditions		

5.4 KPI Management

Tip: Enable comprehensive performance measurement through flexible KPI definition and tracking capabilities. The system must support both standard and custom metrics while providing real-time monitoring, automated data collection, and sophisticated analysis tools to drive performance improvement across all organizational levels.

Requirement	Sub-Requirement	Y/N	Notes
KPI Definition	Provide pre-defined KPI library		
	Support custom KPI creation		
	Enable industry-specific metrics		
Performance Monitoring	Real-time KPI tracking		
	Automated data collection		
	Alert threshold configuration		
Comparative Analysis	Compare actual vs. target		
	Track historical performance		

	Benchmark against industry standards		
--	--------------------------------------	--	--

5.5 Data Integration and Consolidation

Tip: Deliver robust data integration capabilities that ensure seamless information flow across systems while maintaining data integrity. The solution must support multiple data sources, provide strong validation mechanisms, and enable automated data collection while ensuring consistency across the organization.

Requirement	Sub-Requirement	Y/N	Notes
System Integration	Connect with ERP systems		
	Interface with CRM platforms		
	Link to accounting systems		
Data Management	Ensure data accuracy		
	Maintain data consistency		
	Implement validation rules		
Automation	Automate data collection		
	Schedule data updates		
	Configure data workflows		

5.6 Financial Consolidation and Reporting

Tip: Support comprehensive financial consolidation across multiple entities, currencies, and accounting standards while providing flexible reporting capabilities. The system must automate complex consolidation processes and deliver both standard and customizable financial reports with real-time data access.

Requirement	Sub-Requirement	Y/N	Notes
Data Consolidation	Automate financial data collection		

	Process intercompany transactions		
	Handle multiple accounting standards		
Financial Reports	Generate standard financial statements		
	Create custom financial reports		
	Support regulatory reporting		
Multi-entity Support	Handle multiple currencies		
	Process multiple legal entities		
	Manage different fiscal periods		

5.7 Analytics and Business Intelligence

Tip: Provide advanced analytics and BI capabilities that balance power with usability, enabling users to gain actionable insights from complex data sets. The system should support both standard and ad-hoc analysis while delivering intuitive visualization tools and flexible reporting options.

Requirement	Sub-Requirement	Y/N	Notes
Data Analysis	Provide advanced analytics tools		
	Support predictive analytics		
	Enable trend analysis		
Visualization	Create interactive dashboards		
	Generate custom charts		
	Support data storytelling		
Report Generation	Create standard reports		
	Enable ad-hoc reporting		
	Support report scheduling		

5.8 Workflow Automation

Tip: Enable comprehensive workflow automation that streamlines business processes while maintaining appropriate controls and visibility. The system should support complex approval hierarchies, conditional routing, and automated notifications while providing clear status tracking and reporting.

Requirement	Sub-Requirement	Y/N	Notes
Process Automation	Automate performance tracking		
	Configure workflow rules		
	Enable conditional routing		
Approval Management	Set up approval hierarchies		
	Configure approval rules		
	Track approval status		
Alert System	Configure alert triggers		
	Set up notification rules		
	Enable escalation paths		

5.9 Compliance and Risk Management

Tip: Integrate comprehensive compliance monitoring with robust risk management capabilities to ensure regulatory adherence and proactive risk mitigation. The system must support automated compliance tracking, risk assessment, and reporting while maintaining audit trails and documentation.

Requirement	Sub-Requirement	Y/N	Notes
Compliance Management	Integrate with GRC software		
	Track regulatory requirements		
	Monitor compliance status		

Risk Assessment	Identify business risks		
	Evaluate risk impact		
	Track risk metrics		
Automated Monitoring	Configure compliance checks		
	Set up risk alerts		
	Generate compliance reports		

5.10 User Access Management

Tip: Implement robust access controls that balance security with usability, ensuring appropriate data access while maintaining comprehensive audit trails. The system must support role-based access control, integrate with enterprise authentication systems, and provide detailed activity logging.

Requirement	Sub-Requirement	Y/N	Notes
Access Control	Implement role-based access		
	Configure user permissions		
	Manage user groups		
Security Features	Enable data encryption		
	Implement authentication controls		
	Support SSO integration		
Audit Capability	Track user activities		
	Monitor system access		
	Generate audit reports		

5.11 Collaboration Tools

Tip: Enable seamless collaboration across departments through integrated communication and document management capabilities. The system should

support team interaction, document sharing, and feedback collection while maintaining version control and audit trails.

Requirement	Sub-Requirement	Y/N	Notes
Communication Tools	Enable cross-department messaging		
	Support team discussions		
	Facilitate information sharing		
Document Management	Support version control		
	Enable document sharing		
	Track document history		
Mobile Access	Provide mobile app access		
	Enable remote collaboration		
	Support offline capabilities		

5.12 Scalability and Customization

Tip: Deliver a flexible system that can grow with organizational needs while providing comprehensive customization options. The solution must support increasing data volumes, user counts, and functional requirements while enabling tailored configurations for specific business needs.

Requirement	Sub-Requirement	Y/N	Notes
Customization Options	Customize reports and dashboards		
	Configure workflows		
	Modify system parameters		
Scalability Features	Support user growth		
	Handle increased data volume		

	Enable system expansion		
Industry Support	Provide industry templates		
	Support sector-specific needs		
	Enable best practices		

5.13 Sustainability Reporting

Tip: Provide comprehensive ESG reporting capabilities with automated data collection and metric tracking. The system must support various sustainability frameworks while enabling efficient data gathering and accurate performance monitoring against environmental and social goals.

Requirement	Sub-Requirement	Y/N	Notes
ESG Reporting	Generate ESG reports		
	Track sustainability metrics		
	Monitor environmental impact		
Data Collection	Automate ESG data gathering		
	Validate sustainability data		
	Track data sources		
Performance Monitoring	Monitor ESG performance		
	Track progress over time		
	Compare against targets		

5.14 Process Modeling

Tip: Enable comprehensive process design and optimization through intelligent modeling capabilities. The system should support both standard and custom process models while providing recommendations for improvement and performance optimization.

Requirement	Sub-Requirement	Y/N	Notes
Process Design	Model business processes		
	Configure process flows		
	Define process rules		
Optimization	Recommend improvements		
	Monitor process efficiency		
	Track optimization metrics		
Template Management	Use preconfigured models		
	Customize process templates		
	Share best practices		

6. AI and Machine Learning Capabilities

6.1 Ask AI (Generative AI Assistant)

Tip: Implement an advanced AI assistant that provides natural language interaction for data analysis and reporting. The system must understand complex queries, provide contextual responses, and support both text and voice input while maintaining accuracy and relevance in financial analysis.

Requirement	Sub-Requirement	Y/N	Notes
Natural Language	Process text queries		
	Handle voice commands		
	Understand context		
Response Generation	Provide visual responses		
	Generate text explanations		
	Create interactive replies		

Data Analysis	Process financial data		
	Analyze reports		
	Generate insights		

6.2 Intelligent Analytics

Tip: Deliver sophisticated analytics capabilities that combine ease of use with advanced processing power. The system should enable self-service analysis while providing automated insights and supporting complex data exploration through intuitive interfaces.

Requirement	Sub-Requirement	Y/N	Notes
Self-Service	Enable report creation		
	Support ad-hoc analysis		
	Provide data exploration		
Dashboard Creation	Build custom dashboards		
	Create visualizations		
	Enable interactivity		
Data Search	Implement quick search		
	Enable advanced filtering		
	Support natural language search		

6.3 AI Automapping

Tip: Provide intelligent data mapping capabilities that streamline integration processes while maintaining data governance standards. The system must automatically identify and map data elements across systems while ensuring accuracy and compliance.

Requirement	Sub-Requirement	Y/N	Notes
-------------	-----------------	-----	-------

To download the full version of this document,
visit <https://www.rfphub.com/template/free-corporate-performance-management-cpm-software-template/>

[Download Word Docx Version](https://www.rfphub.com/template/free-corporate-performance-management-cpm-software-template/)