RFP Evaluation Scorecard

Most RFP advice covers the document you send out. Almost none covers the decision you make when the bids come back. That is where the money actually moves. This is the scoring structure we use.

SET THE WEIGHTS BEFORE THE BIDS OPEN

Agree weights with the business and sign them off before a single response is unsealed. Weights set after you have seen the prices are no longer criteria; they are a justification for a decision already made, and any losing bidder can see it.

THE SIX CRITERIA GROUPS

CRITERION	WHAT YOU ARE SCORING	TYPICAL WEIGHT
Total cost	Normalized cost of ownership over the contract term, not the headline price. See the Bid Comparison Sheet.	20–30%
Technical fit	Does the solution meet the requirement as written, and how much of the gap is configuration versus custom work?	20–30%
Delivery capability	Named team, method, evidence of comparable delivery at comparable scale. Capacity, not credentials.	15–20%
Risk and compliance	Insurance, security posture, financial stability, indemnity, data handling, regulatory exposure.	10–20%
Commercial terms	Payment terms, price protection, indexation, termination rights, service credits.	10–15%
Service and support	SLAs, escalation path, account governance, response and resolution commitments.	5–15%

THE SCORING SCALE

A five-point scale with written anchors. Anchors matter more than the scale: without them, a 4 from one evaluator is a 2 from another and the total means nothing.

- **5. Exceeds.** Meets the requirement and adds demonstrable value the others do not offer.
- **4. Fully meets.** Meets the requirement with evidence. No material gaps.
- **3. Meets with gaps.** Meets the requirement, with gaps that are closeable and identified.
- **2. Partially meets.** Material gaps that need work, cost or risk acceptance to close.
- **1. Does not meet.** Does not meet the requirement, or does not answer the question asked.

FOUR RULES THAT KEEP A SCORECARD DEFENSIBLE

- **Write a rationale for every score.** A number with no sentence behind it cannot be defended to a bidder, to finance, or to yourself in six months.
- **Score independently, then reconcile.** Evaluators score alone first. Group scoring converges on whoever speaks first and loudest.
- **Never change a weight mid-evaluation.** It is the most common ground for a successful challenge. If the criteria were wrong, restart the evaluation rather than adjusting the maths.
- **Score the answer, not the relationship.** The incumbent gets no points for being known. If incumbency has genuine value, price the switching cost into total cost where it belongs.

THE MOST COMMON FAILURE

Equal weighting. Giving every criterion the same weight says that price, risk and support all matter identically, which is never true. It also hands the decision to whichever category happens to have the most line items.

If you cannot articulate why one criterion outweighs another, the requirement is not yet clear enough to go to market.

THE COMPANION SPREADSHEET

The Excel version of this scorecard does the arithmetic: enter weights and raw scores and it returns the weighted total for up to four bidders, flags when weights do not sum to 100%, and ranks the field. Both files come in the same download.