Developing a Requirements Matrix

By Karl M. Kapp

A Requirements Matrix is simply a listing of every SINGLE requirement in the RFP including page and paragraph number. The process of developing the Requirements Matrix is actually quite simple. The first step is to have each of the RFP response team members read the RFP individually. After each team member has read the entire RFP a number of times, he or she should develop a list of requirements. This list is commonly referred to as the Requirements Matrix.

Once individual team members develop the matrix, the team members meet as a group and compare each list. If an item is on everyone's list, it is definitely a requirement. If the item is only on one person's list: it needs to be revisited to determine whether or not it is an actual requirement. It is difficult to go through an RFP too carefully.

The Figure below is an example of the *Requirements Matrix*. The matrix is simply a table listing all of the requirements contained within the RFP, including the page number and paragraph number if appropriate. This matrix helps to ensure that all the requirements of the RFP are addressed.

One method some vendors use to ensure that their proposal is "compliant" with the client's RFP is to add another column to the matrix titled "Proposal Page Number." This column lists the page in the proposal on which the RFP requirement is addressed. When all the requirements are listed in that fourth column, the proposal is complete.

Gathering all requirements is important. A seemingly minimal or unimportant requirement may get missed in the requirements matrix, and that very item could be hugely important to a particular member of the client's proposal review team. Some RFPs have over 250 separate requirements. In addition, missing even one requirement can result in the client labeling your proposal as non-compliant, and it will then be disqualified from the review process.

Requirement	RFP Page #	Paragraph #	Proposal Page #
Executive summary • Outline of design solution • Time/cost to complete work	4	2	
Understanding of problem description	4	3	
Product description • Describe finished product • Include prototype screens • Describe how product would be used in business scenario by end-users	4	4	
Project description • Describe our approach • Narrative work plan • Resources (client and vendor) • Timeline • Costs o Ongoing fees • Payment schedule • Deliverables • Appendix o MS Project Gnant Chart o Line-item spreadsheet to include team member roles, time, cost per deliverable	4	5	
Appendices • Client references • Resumes • Client work samples • Demos as screen shots	4	6	
Length – 40 pages, 12 pt font	4	7	
Learning portal • User profiling (who took class, performance, time, company) • Links to training (10 courses initially) • Weather reports • Mapping functionality • Space for advertisement • Job announcements • Links to other sites • On-line discussion groups on various topics • On-line catalog of trucking related products	5	4	
Objectives of Learning portal • Simple, easy, intuitive • Meaningful information • Common look for entire site • Help assure regulatory compliance • Reduce fines for non-compliance • Provide a community for truckers on road • Encourage drivers to seek more training • Aggregate truckers around portal for advertising, communication, market access • Generate revenue for Truckco	6	1	

Audience – PA truck drivers then expand	7	1	
Learning environment • Kiosk within a truck stop (most desired) • Home office • Palm devices and digital phone interactions	7	2	
Hardware Equipment • 2808 modem (outside of kiosk) • Server size recommendation • Applicable development recommendation • Kiosk prototype configuration	7	2	
Kiosk specifications • Delivery hardware • Browser • Dialup • ActiveX Controls/Plug-Ins (necessary or not)	7	4	
Streaming Media (not necessarily a requirement)	7	5	
Security • Student ID and password • Time-out feature (recommend the time) • Profiling (used to customize the content) • Tracking o Completion date o Test scores ▪ Self assessment ▪ Evaluation assessment o Databases - ODBC compliant	7	6	
Content training titles (10 initial)—two prototype samples • Basics of Truck Driving • Pre and Post Drive Inspection	9	1	
Quality assurance test plan	9	3	
Provide all source code, graphics, to Truckco	9	4	

About the Author

Karl M. Kapp, Ed.D., CFPIM, CIRM, is a consultant, speaker, scholar, professor and expert on the convergence of learning, technology and business operations. His background teaching e-learning classes, knowledge of adult learning theory, and experience training CEOs and front line staff provides him with a unique perspective on organizational learning. This piece is an exert from his book *Winning E-Learning Proposals: The Art of Development and Delivery*.

He believes that the effective convergence of learning and technology are the keys to increased productivity and profitability. For further information, visit his web-site at www.karlkapp.com.