

Request for Information (RFI): [Software category or project name]

Item	Details
Issued by	[Organization name]
RFI reference	[RFI-YYYY-NNN]
Issue date	[Date]
Deadline for questions	[Date, time and time zone]
Responses due	[Date, time and time zone]
Contact	[Name, title, email address]

How to adapt this RFI to your category (delete this note before sending)

This template is written for a generic software or technology purchase.
To fit it to yours:

1. Replace every [square-bracket placeholder]. Search the document for "[" to find them.
2. Describe your problem in Section 3 in your own words and fill in the scope table. Without your user numbers, systems and data volumes, vendors can't give useful answers or indicative prices.
3. Replace [Key need 1] to [Key need 5] in Section 8.3 and Section 9 with the things the product must do for you. For a CRM, that might be pipeline management, email and calendar sync, and service cases. For a service desk tool, incident and request workflows and a self-service portal. For an ERP system, multi-entity accounting, purchasing and inventory.
4. Add two or three questions where your category's decision is really made. For a security product, expand Section 8.5. For an AI product, expand question E7 to cover where prompts and outputs are stored and for how long.
5. Delete questions whose answers won't change who goes on your shortlist. Every question you keep is work for the vendor and for your reviewers.

6. Have your procurement office or legal counsel check Section 4 before you send it. This matters most for public bodies, because the rules on RFIs, public records and vendor contact vary by jurisdiction.
7. Delete this note and the italic instructions addressed to buyers. Keep the italic notes addressed to respondents.

1. Purpose of this RFI

[Organization name] is issuing this request for information (RFI) to learn about [software category, e.g., "customer relationship management (CRM) software"] and the vendors that provide it.

We are at an early stage. We want to understand the products and approaches available, how they are usually implemented and priced, and which vendors work with organizations like ours. We will use responses to:

- improve our understanding of the market and refine our requirements;
- estimate the budget and internal effort a project would need;
- decide whether to go ahead and, if we do, which vendors to invite to a later stage, such as a request for proposal (RFP) or product demonstrations.

This RFI is for information and planning only. It is not a request for proposal or a request for quotation. Section 4 explains what it does and does not commit us to.

2. About our organization

Buyers: give vendors enough context to tailor their answers. A short paragraph and the table below are enough.

[Organization name] is a [type of organization, e.g., "regional healthcare provider" or "business-to-business software company"] based in [location]. We [one sentence on what the organization does and who it serves].

Item	Details
Industry or sector	[Industry]
Employees	[Number]
Locations and regions in scope	[Countries, states or sites]
Departments affected	[e.g., Sales, Customer Service, Finance, IT]
Regulations that apply to us	[e.g., HIPAA, GDPR, PCI DSS, public-sector rules, or "none specific"]

Item	Details
Website	[URL]

3. Background and the problem we're exploring

3.1 Current situation

[Describe how the work is done today: the systems, spreadsheets or manual processes in use, roughly how long they've been in place, and who uses them.]

3.2 The problem

[Describe the problems you want to solve, in business terms. For example: "Sales and service teams keep customer records in separate systems, so no one has a complete view of an account," or "Our current system reaches end of support on [date]."]

3.3 What we want to achieve

[List three to five outcomes. For example: "One customer record shared by sales and service" or "Month-end reports without manual spreadsheet work."]

- [Outcome 1]
- [Outcome 2]
- [Outcome 3]

3.4 Scope as we understand it today

*Buyers: these figures help vendors give realistic answers and indicative pricing.
Estimates are fine; mark them as estimates.*

Item	Current figure or estimate	Notes
Users	[Number, by type, e.g., full users and occasional users]	[Expected growth, if known]
Sites, regions or business units	[Number and list]	
Data volumes	[e.g., number of records, transactions per month, storage]	
Systems to integrate with	[e.g., our ERP, identity provider, HR system, data warehouse]	

Item	Current figure or estimate	Notes
Data to migrate	[Source systems and approximate volume]	
Target timing	[e.g., "decision by [quarter], live by [quarter]"]	
Budget range (optional)	[Range, or "not shared at this stage"]	

3.5 Questions we haven't settled

Buyers: list the open questions you want the market to help you answer, so vendors address the questions you actually have.

- [e.g., Whether a cloud service or a self-hosted product suits us better]
- [e.g., Whether one platform can replace several of our current tools]
- [e.g., Whether to replace our current system or upgrade it]

4. What this RFI is and is not

Buyers: check this section with your procurement office or legal counsel before you send it, especially if you are a public body. The rules that apply to RFIs, confidentiality and public records vary by organization and jurisdiction.

No commitment to buy. This RFI is issued for information and planning purposes only. It is not a request for proposal, a request for quotation or an invitation to submit offers. [Organization name] is not obliged to issue an RFP or to buy anything, from any respondent.

No contract. Responses to this RFI are not offers, and no response will be accepted to form a contract. Any purchase would follow a separate process and a written agreement signed by both parties.

Indicative information only. We will treat pricing, timelines and similar information in responses as indicative and use it for planning only. It will not bind the respondent.

Costs borne by respondents. Each respondent bears its own costs of preparing and submitting a response, and of any follow-up such as meetings or demonstrations. We will not pay for information provided in response to this RFI.

Future eligibility. [Choosing not to respond to this RFI will not, by itself, exclude a vendor from any later RFP.] *Buyers: delete or change this if your rules differ.*

Our confidentiality. The information about [Organization name] in this RFI is confidential. Use it only to prepare your response, and share it only with employees and partners who need it for that purpose. [Optional: Respondents must sign the attached non-disclosure agreement before responding.]

Your confidentiality. Mark any part of your response that is confidential or commercially sensitive, but don't mark the whole response. We will take reasonable steps to protect marked information, share responses only with the people involved in this review [and our advisers], and not disclose one respondent's confidential information to another. [Public bodies: replace this paragraph with your jurisdiction's public-records wording, including whether responses may be disclosed if the law requires it.]

Use of responses. We may use what we learn from responses to plan our project and write requirements for any later RFP. We will keep responses for our records and will not return them.

Changes and cancellation. We may change the timeline, issue written addenda or cancel this RFI at any time. We will send any change to every recipient [or: post it at [location]].

5. Instructions and response format

1. **Follow our structure.** Answer the questions in Section 8 in order, using our question numbers (A1, A2 and so on). If a question doesn't apply to you, say so and explain why.
2. **Complete the capability checklist** in Section 9 and the response cover sheet in Section 10. Put the cover sheet at the front of your response.
3. **Be specific.** We prefer short, direct answers to marketing copy. Keep each answer to [300] words or fewer unless the question asks for a list or a table.
4. **Say who provides what.** If any part of an answer depends on a partner, reseller or third-party product, name it.
5. **Separate today from the future.** Describe a feature as available only if it is in a generally available release today. Mark anything in beta, preview or on the roadmap, and give an expected release date.
6. **Length and attachments.** Keep the main response to [25] pages or fewer, excluding attachments. You may attach material such as [a product

overview or a security summary], but don't answer a question only by pointing to an attachment.

7. **How to submit.** Email your response as [one PDF or Word file] to [email address] with the subject line "RFI [reference] response - [Vendor name]" by the deadline in Section 6. [Or: upload it through [portal name and URL].] We will confirm receipt by email.
8. **Late responses.** [We may decline to review responses received after the deadline.]
9. **Intent to respond (optional).** Please tell the contact in Section 7 by the date in Section 6 whether you intend to respond.

6. Timeline

Buyers: the dates below are an example schedule that gives vendors two weeks to respond. Adjust them to suit your purchase and your organization's rules.

Event	Date	Notes
RFI issued	[Date]	Sent to all recipients on the same day
Intent to respond (optional)	[Date, e.g., one week after issue]	Email to the RFI contact
Deadline for questions	[Date, time and time zone, e.g., end of week 1]	In writing to the RFI contact only
Answers sent to all recipients	[Date, e.g., early in week 2]	Questions shared without naming the vendor who asked
Responses due	[Date, time and time zone, e.g., end of week 2]	See Section 5 for format
Review of responses	[Dates, e.g., week 3]	
Possible follow-up: clarification calls or demonstrations	[Dates, e.g., week 4]	By invitation; not every respondent will be invited
Decision on next step	[Date]	For example, issuing an RFP to a shortlist

All dates after the response deadline are indicative and may change.

7. Contact point and rules of communication

All communication about this RFI must go through one contact:

- **Name:** [Name]

- **Title:** [Title]
- **Email:** [Email address]
- **Phone:** [Phone number, or "Please use email"]

These rules apply from the issue date until [the decision on next step / a date]:

- Send questions in writing to the contact above by the question deadline in Section 6.
- We will answer in writing and send every question and answer to all recipients, without naming the vendor who asked. If your question would reveal confidential information about your product, say so, and we will decide whether we can answer it privately and still be fair to other respondents.
- Do not contact other employees, board members or advisers of [Organization name] about this RFI. Existing business contacts on other matters can continue as normal. [Contact outside these rules may lead us to set a response aside.]
- Only written addenda from the contact above change this RFI. Spoken comments from any of our staff do not.
- We may contact respondents to clarify their answers or to arrange follow-up calls or demonstrations.

8. Questions for respondents

Answer every question that applies to you. Where a question refers to "our needs" or "our scope", see Section 3.

8.1 Company profile

A1. Give your company's legal name, headquarters location, year founded and ownership (for example, publicly listed, privately held, investor-backed or part of a larger group).

A2. How many people do you employ in total, and how many work in product development, customer support and implementation services?

A3. Where are the staff who would sell to, implement for and support us? Do you have a presence in [our countries or regions]?