

# DecisionDirector RFP Process Overview

Last Modified on 06/15/2022 9:40 am MST

This document provides an overview of [Advantiv's](#) DecisionDirector process for supporting public and private sector procurements.

## Role of DecisionDirector in an RFP

### For Procuring Organizations

DecisionDirector provides a safe and secure online environment through which procuring organizations can electronically collect, collate, and then compare, analyze or evaluate detailed line-item responses to the individual questions and requirements, including information, form and document requests, contained within an RFP, RFI or other similar official procurement documents.

In this role, DecisionDirector makes it possible to capture detailed responses as individual fields of data in a secure database, thus allowing for levels of speed, precision, and convenience in bid evaluations not possible with Word, PDF, or Excel-based responses.

Prior to a bid event, DecisionDirector is often used to gather input from stakeholders (e.g., requirements review). After the bid event, DecisionDirector is often used to support due diligence activities such as bid, demo, and orals evaluations.

### For Bidders

DecisionDirector provides bidding organizations with a private, secure response environment that allows for password-protected individual response team SME logins, date/time stamps and attribution for all response entries, enforced completion of required response fields and formats, progress tracking, and response extracts and artifact generation (Zip, Word, or PDF documents) on demand for internal QA and approval reviews.

### For Bid Events

For bid events, DecisionDirector can serve as the official bid response collection and submission site, or it can serve strictly as the line-item response collection platform with the official submission of the compiled responses occurring in a separate procurement environment.

DecisionDirector is not a bid publication site.

## DecisionDirector Bid Event Support with Control Procedures and Protocols

The following outlines the typical process in a bid event that is supported by DecisionDirector.

### Bid Event Set-Up

- Issuing Organization's Project Team authors all RFP documents.
- Project Team transmits to Advantiv all RFP line items for which the associated responses are to be collected online via DecisionDirector.
- Advantiv configures all RFP line items for precise response collection and reviews with Project Team until all content

and configurations are approved.

- Advantiv establishes and populates a secure RFP response collection environment.
  - As part of this, a due date and time is set in accordance with the RFP. When that date and time arrive, DecisionDirector automatically transitions to view-only mode and bidders are not able to add or in any way modify their response work.

## Bid Issuance; Bidder Access; Bid Response Collection

- Issuing Organization releases the RFP via its normal procedures.
- As instructed by the RFP, interested bidders send an email request to Advantiv requesting a private, secure response environment for the RFP in DecisionDirector.
  - All bidder response environments for any given RFP are identical.
  - **Advantiv's role is strictly limited** to providing response environments to bidders and any necessary end-user onboarding, user, or technical support.
  - Advantiv does not act or present itself in any way as an agent of the Issuing Organization.
  - Advantiv does not comment on or answer questions about the RFP, instead referring all such inquiries by bidders to the designated point of contact for the RFP.
- Bidders create their own response teams in DecisionDirector, with each person receiving a private password-protected login.
  - Advantiv personnel do not have ability or authority to log into any bidder's response environment.
- Bid response teams from each Bidder will answer each question, upload files and attachments, and respond to all requirements within the Bidder's private and secure DecisionDirector response environment.
  - All responses are recorded with a date/time stamp and with personal attribution of the user who saved the response.
  - All response saves are journaled in the DecisionDirector database.
- Advantiv does not convey any information regarding bidder's response work to anyone, including the Issuing Organization, unless specifically authorized in writing by the Issuing Organization in advance of the RFP event.

## Bidder Questions

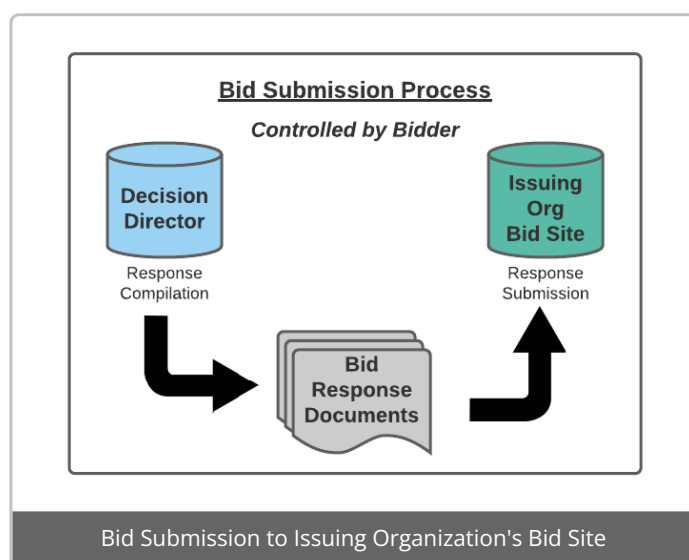
- If DecisionDirector is to serve as the collection point for bidder questions:
  - Advantiv will establish a question collection location within each bidder's private and secure RFP response collection environment in DecisionDirector.
  - Bidders will upload a document containing their questions to their assigned question collection location.
  - At the designated time, Advantiv will extract the uploaded questions documents (and nothing else) and deliver them to designated Issuing Organization contact via an agreed secure method such as an encrypted email from Advantiv's Dropbox site, or delivery to the Issuing Organization's secure file upload site.
  - Under no circumstances is standard email used to convey bidder questions.

## Bid Submission – Via DecisionDirector

- If DecisionDirector is to serve as the official bid submission site, bidders are solely responsible for the timely formal submission of their responses in DecisionDirector.

## Bid Submission – Via Issuing Organization’s Site

- If DecisionDirector is to serve only as the response collector (or compiler) platform:
  - Bidders are solely responsible for downloading their bid response document(s) from DecisionDirector that will then be submitted, by each bidder, to the designated procurement environment specified in the RFP.
  - At no time in this process does Advantiv access, process, or in any way interact with any bid response.
- To complete the official bid submission to the Issuing Organization’s site:
  - Bidder will download bid response document(s) from DecisionDirector
    - Each bid response document receives a file system date/time stamp and a file size.
    - Bidders are instructed to make no changes whatsoever to bid response document(s) downloaded from DecisionDirector.
  - Bidder will upload bid response document(s) to Issuing Organization’s site
    - See Bid Submission Process diagram below:



- Should an Issuing Organization desire to verify that the bid response documents were not modified prior to submission, DecisionDirector provides Issuing Organizations the option of obtaining a **read-only role** through which a duly authorized representative can access DecisionDirector, *after the RFP closes*, to produce the same bid response documents the bidders produced to facilitate comparison.
- Advantiv’s interactions with bidders is, as always, strictly limited to providing support in the use of DecisionDirector, including how to produce bid response documents, et cetera.

## Bid Response Analysis

- If Advantiv is engaged to support the analysis of the RFP responses:
  - Advantiv will never access any bidder response data until after the RFP has closed.
  - Advantiv will only access bidder response data only when directed to do so by the Issuing Organization, at

which time such access is limited to the production of reports, extracts and artifacts as previously agreed between Advantiv and the Issuing Organization.

- Advantiv will deliver analysis results to the designated Issuing Organization contact via an agreed secure method such as an encrypted email from Advantiv's Dropbox site, or delivery to the Issuing Organization's secure file upload site

## Project-Specific Protocols

Advantiv is happy to agree in writing to abide by the specific procurement protocols required by the Issuing Organization.

## Questions?

Contact [support@advantiv.com](mailto:support@advantiv.com)

---