



Checklist to Evaluate Proposal Pricing Software

The following checklist is designed to help in the evaluation process:

General Software Questions

- Can your company quickly gain value once the software is implemented?
- Is there an onboarding or implementation option?
- Is the platform intuitive?
- Is the platform easy to use?
- Has the system been successfully audited by DCAA and other government agencies?
- Is the system scalable to fit small businesses up to large organizations?

Managing Proposals

- Is proposal setup and data entry fast and easy to support small changes and proposals?
- Is the software robust and sophisticated enough to support the largest pricing efforts?
- Can proposal repricing for direct and indirect rate changes be quickly accomplished and simultaneously available to every proposal?
- Does this software have the ability to accept real-time pricing as inputs flow in from estimators and pricers?
- Does it have user defined fields that allow the company to sort data in any way needed?
- Does it have the ability to merge proposals?
- Can a user change the period of performance or price of proposal?

Data Entry and Management

- Does it allow Cost Estimating Relationships (CERs) to be defined so that one resource estimate is generated based on other estimates, classes of cost, or cost elements?
- Does the software have integrated applications available for estimators or government agencies?
- Does the system allow multiple data entry methods (ie: discrete annually, quarterly, monthly input, level load, profile spread)?
- Has an extensive tool set to manage proposal data enabling fast and bullet proof accurate turn-around of changes and what-if analyses (ie: Shift proposal period of performance, Ability to factor specific resources, classes of resources, or entire elements of cost)?
- Does it offer a single data package for transmittal of cost volume to government agency?

Reporting

Does it have flexible reporting to present your data in any format required?
Can a user easily compare two or more proposals?
Does the software allow report generation in terms of both your company's and customer's fiscal years?

System Administration

Will this platform require ongoing attention from your IT department?
Does the software have the option to assign and control users and role based permissions?

Support

Is Technical Support included?
Is there a dedicated team to help train and support?

Integration

Is there an API available?
Does it integrate with standard OTS Oracle or SQL?
Does it have the ability to connect or sync material information from ERP systems or other material information systems?
Does it have the ability to sync a material management system/procurement system?

