



Enterprise CMS Migration RFP Template

A buyer brief, vendor response schedule and evaluation model for CMS migrations. **26 sections and four working appendices.** Companion scoring and cost workbook included.

How to use this template

Use this template to request comparable proposals for a CMS migration. It covers the existing estate, the work to deliver, and the evidence each vendor must provide. Use it when changing CMS, replacing an implementation partner, or planning a migration to a platform already selected.

Start with the buyer brief. Assign Sections 1-11 to the people who own the relevant information. A digital lead coordinates the brief; content owners supply the inventory, technical owners describe integrations, and procurement confirms the process and commercial requirements.

Keep unknowns visible. Enter “Unknown”, an owner, and a date to resolve it. Ask vendors to price discovery separately where an unknown affects scope. Delete irrelevant sections and explain exclusions in Section 11.

Issue one response schedule. Vendors answer Sections 12-23 using the same numbering. Require evidence, assumptions, exclusions, dependencies, and a price basis. Circulate answers to clarification questions to all bidders through the process agreed with procurement.

Agree the decision before the responses arrive. Set mandatory criteria, weights and scoring evidence in Section 24. Use the companion XLSX workbook to compare three vendors and their three-year cost on the same assumptions. Copy the workbook if you need another evaluator's scores.

The labels **[BUYER]** and **[VENDOR]** identify who completes each section. Italic prompts are guidance to remove before issue. The PDF is a reading copy; complete the DOCX in Word or import it into Google Docs. Recheck pagination after editing. Use the workbook in Excel or import it into Sheets.

Before you issue the RFP

- ☐ A named owner has reviewed every section of the buyer brief.
- ☐ Content counts, integrations and the launch scope are documented.
- ☐ Unknowns have owners and an agreed treatment in vendor pricing.
- ☐ Mandatory criteria, scoring weights and evidence are agreed.
- ☐ Budget basis, currency, deadlines and vendor access are confirmed.
- ☐ Procurement has approved the process and contract requirements.

For regulated or public procurement, have your procurement and legal owners adapt the process, accessibility requirements and contract terms to your organisation. The example timeline is a planning aid.

Contents

Part 1 — The brief

1. Organisation, contacts, and how to respond
2. Why you are moving
3. What exists today
4. Content inventory
5. Content model and editorial workflow today
6. Integration register
7. URLs, redirects, and search continuity
8. Non-functional requirements
9. Localisation, brands, and regions
10. Constraints, budget posture, and timeline
11. Explicitly out of scope

Part 2 — The response schedule

12. Scope and deliverables
13. Content migration approach
14. Integration approach
15. Redirect and search continuity plan
16. Editorial workflow, roles, and permissions
17. Training and enablement
18. QA and acceptance
19. Cutover and rollback
20. Hypercare and ongoing support
21. Team, ways of working, and references
22. Commercials
23. Contract terms: IP, data, and exit

Part 3 — Evaluating the responses

24. Weighted scoring matrix
25. Red flags
26. RFP process timeline

Appendices

- A. Content inventory sheet — column set
- B. Integration register — column set
- C. Redirect map — column set
- D. Clarification log

PART ONE

01

The brief

The factual account of your estate. Only your organisation can write it, and filling it in is most of the work.

01 Organisation, contacts, and how to respond

BUYER

FIELD	YOUR ENTRY
Organisation	
Sector	
Primary contact for this RFP	
Technical contact	
Procurement contact	
Decision maker (signs the contract)	
Response format	<i>e.g. PDF, max 25 pages excluding appendices</i>
Response deadline	
Questions deadline	
Questions channel	<i>A single mailbox. Answers circulated to all bidders.</i>
Presentation stage	<i>Date, format, who attends</i>
Award date	
Contract start	

Name the decision maker and confirm their authority to approve the contract. Document any additional approvals and the time they need.

Circulate every answer to every bidder. An answer given to one vendor privately produces responses priced against different information, which is the same failure this document exists to prevent.

02 Why you are moving

BUYER

State the trigger and identify any deadline that changes the delivery plan.

FIELD	YOUR ENTRY
The trigger	<i>Vendor end of life, licence economics, an editorial bottleneck, a content model the current system cannot express, a security or accessibility finding, an acquisition</i>
Hard external date, if any	<i>Support end date, contract renewal, campaign, regulatory deadline</i>
What happens if the date is missed	

FIELD	YOUR ENTRY
What "better" looks like in one sentence	
Who feels the current problem daily	

Outcomes. *List five to eight. Write them so each is testable by someone outside the project. "Modern, scalable platform" is not testable. The examples below are.*

- Editors publish a new page without a developer.
- Content is served to the website and the mobile app from one source.
- A new regional site launches in under four weeks.
- The platform is hosted in the EU and meets our data residency policy.
- A brand manager can restrict edit rights to one field on one template.
- Time from copy approved to live drops from five days to one.

What success looks like at 30, 90, and 365 days after launch.

HORIZON	MEASURE	TARGET
30 days		
90 days		
365 days		

Include a measure of ongoing operation, such as editor independence or support effort, alongside launch acceptance.

03 What exists today

BUYER

FIELD	YOUR ENTRY
Current CMS and version	
Hosting arrangement	Vendor cloud, own cloud account, on-premise, hybrid
Vendor support status	In support / extended support / ended, with the date
Front end	Framework, version, who maintains it, whether it is in scope
Search	Platform search, Elastic, Algolia, none
Number of sites or properties	
Number of content types	
Number of named editors	
Number of concurrent editors at peak	
Roles in use today	
Traffic	Monthly sessions, peak day, geographic split
Environments	Prod, staging, dev — and whether they match
Deployment process	Who can deploy, how often, how long it takes
CI/CD in place	
Documentation that exists	
Documentation that does not exist	
Named problems	Specific and measurable. "Publishing takes 45 minutes and needs a developer to push manually", rather than "it's slow"

The documentation gap is a line item. A vendor who is not told about it does not price discovery for it, and discovery happens anyway once the project starts.

Access for bidders. State what shortlisted vendors will be given and when: a read-only CMS login, a database schema export, an anonymised content sample, a sitemap, an analytics export. Give vendors enough access to state a price basis and identify remaining assumptions.

04 Content inventory

BUYER

The inventory gives vendors a basis for pricing content migration. Appendix A provides the column set.

CONTENT
TYPEITEM
COUNTRICH
TEXT?EMBEDDED
COMPONENTS?MEDIA
ITEMS

LANGUAGES

MIGRATE / ARCHIVE / DROP

Totals

FIELD

YOUR ENTRY

Total items in the current system

Items proposed for migration

Items proposed for archive

Items proposed to drop

Media library size (items and GB)

Documents and PDFs

Oldest content still receiving traffic

Content nobody has opened in 24 months

Rationalisation. Have content owners decide what to migrate, archive or remove before the RFP goes out. Record retention obligations and traffic evidence for that decision. If a decision is pending, ask vendors to price the affected volume explicitly.

Content quality flags. Say which apply. Each has a cost.

- ☐ Rich text contains inline HTML pasted from Word
- ☐ Pages are assembled from platform-specific block or widget types
- ☐ Entries reference each other by internal ID
- ☐ Media is referenced by absolute URL rather than by asset ID
- ☐ Metadata is stored inconsistently across older content
- ☐ Some content exists only inside a page builder's proprietary format
- ☐ Taxonomy has drifted, with duplicate or near-duplicate terms
- ☐ Content includes embedded forms, tables, or interactive components

Ask vendors to explain the transformation and validation required for each checked item. Include manual handling in their price basis.

05 Content model and editorial workflow today

BUYER

FIELD

YOUR ENTRY

How a page is created today, step by step

Who reviews before publish

How approval is recorded

Whether scheduled publishing is used

Whether versioning and rollback are used

Whether an audit trail is required, and by whom

Where the current process breaks down

What must survive the migration unchanged

What you want to change

Separate required controls from workflows you want to improve. Name the policy owner for mandatory approvals and the business owner for proposed changes.

Governance requirements. Tick what applies and name the authority that requires it.

- ☐ Role-based access control at collection level
- ☐ Field-level permissions (e.g. *an agency edits alt text and nothing else*)
- ☐ Multi-step approval before publish
- ☐ Separate approval path per brand, region, or business unit
- ☐ Immutable audit log of who published what and when
- ☐ Legal or compliance sign-off gate on named content types
- ☐ Scheduled publish and unpublish
- ☐ Content expiry and review reminders

06 Integration register

BUYER

Every system wired into the current CMS has to be accounted for in the new one. Appendix B gives the column set. List everything you know is connected, including the ones you are unsure how.

SYSTEM

PURPOSE

DIRECTION

OWNER

API AVAILABLE?

IN SCOPE?

SYSTEM

PURPOSE

DIRECTION

OWNER

API AVAILABLE?

IN SCOPE?

Common entries: analytics, tag manager, CRM, marketing automation, CDP, search, translation management, DAM, e-commerce, product information management, single sign-on, consent management, personalisation, customer support widget, forms, payment, ERP, event registration.

For each integration, state:

- Who owns the system on your side
- Whether that owner has been told this project exists
- Whether the integration must work on day one or can follow
- Whether the contract with that vendor is up for renewal

Confirm access, decision dates and dependencies with each integration owner, including any contract renewal during the project.

07 URLs, redirects, and search continuity

BUYER

Inventory existing URLs and map changed addresses to relevant new destinations. Google recommends keeping redirects for at least a year and monitoring both old and new URLs during a move. Temporary ranking fluctuations can still occur while Google recrawls and reindexes the site. Agree the redirect owner, test method and monitoring period before launch. See Google Search Central in Sources.

FIELD

YOUR ENTRY

Total indexed URLs	Search Console coverage report
--------------------	--------------------------------

Total URLs in the sitemap	
---------------------------	--

Total URLs receiving organic traffic in 12 months	
---	--

Is the URL structure changing?	
--------------------------------	--

Domains and subdomains in scope	
---------------------------------	--

Existing redirect rules already in place	Count and where they live
--	---------------------------

Who owns the DNS	
------------------	--

Who owns the CDN or WAF	
-------------------------	--

Current Core Web Vitals	From Search Console field data
-------------------------	--------------------------------

Top 50 pages by organic traffic	Attach as an appendix
---------------------------------	-----------------------

Top 50 pages by conversion	Attach as an appendix
----------------------------	-----------------------

URL categories most often missed. *Confirm each is in your count.*

- ☐ Paginated archive and listing pages
- ☐ Tag, category, and author pages
- ☐ Filtered or faceted URLs that are indexed
- ☐ PDFs and other documents
- ☐ Images with inbound links
- ☐ Legacy campaign landing pages outside the main navigation
- ☐ Old URLs already redirecting once (*chains need collapsing, not extending*)
- ☐ Localised and hreflang variants
- ☐ Feeds, sitemaps, and robots.txt
- ☐ Anything referenced in printed material or an email footer

08 Non-functional requirements

BUYER

Accessibility

FIELD	YOUR ENTRY
Target conformance	<i>Name the applicable standard, version, level, scope and test method; confirm with your accessibility owner</i>
Are you in scope for the European Accessibility Act?	
Do you publish a public accessibility statement?	
Has an audit been done, and when?	
Known outstanding findings	
Who signs off accessibility on this project?	

Ask your accessibility and legal owners to confirm which requirements apply to your services, jurisdiction and procurement. Record the required standard and version explicitly. Include manual testing of representative editor journeys and public templates, the audit scope, and how findings must be resolved before acceptance. An automated scan alone is not a complete conformance assessment.

Security and compliance

FIELD	YOUR ENTRY
Certifications required of the vendor	<i>ISO 27001, SOC 2, Cyber Essentials</i>
Are you in scope for NIS2?	<i>Legal/security owner to confirm applicability and local requirements</i>
Penetration test required before launch?	

FIELD

YOUR ENTRY

Who conducts it, and who pays?

Vulnerability disclosure process

SSO requirement *Provider and protocol*

MFA requirement

Data classification of content in scope

Data residency and privacy

FIELD

YOUR ENTRY

Where must data be stored?

Where may data be processed?

Sub-processor approval process

DPA required?

Records of processing to be updated by whom

Retention policy for content and for logs

Consent management platform in use

Performance and availability

FIELD

YOUR ENTRY

Core Web Vitals targets

Peak traffic to design for

Availability target

Editorial performance target *Time to save, publish, and preview a page*

Publish-to-live latency target

Disaster recovery: RPO and RTO

Backup frequency and retention

Editorial performance is the requirement most often left out and most often complained about after launch. A platform can serve pages in 200 ms and still take eleven seconds to save a document, and the second number is the one your editors experience every day.

09 Localisation, brands, and regions

BUYER

FIELD	YOUR ENTRY
Languages in scope	
Locales in scope	<i>Language and region can differ</i>
Brands or business units on the platform	
Do brands share a content model?	
Do brands share a design system?	
Translation process today	<i>Human, machine, hybrid, agency</i>
Translation management system, if any	
Who approves a translation	
Regional hosting or infrastructure constraints	<i>Including any region requiring in-country delivery</i>
Regional compliance differences	

10 Constraints, budget posture, and timeline

BUYER

FIELD	YOUR ENTRY
Target platform, if decided	<i>And whether the decision is open to challenge</i>
Platforms excluded, and why	
Technologies mandated by your architecture board	
Internal team available to the project	<i>Roles and days per week</i>
Content freeze: can you have one, and for how long?	
Blackout periods	
Budget range	<i>See the note below</i>
Budget approval status	<i>Approved, in business case, indicative</i>
Preferred commercial model	<i>Fixed scope and price, time and materials, capped T&M</i>

On disclosing a budget range. A range produces better responses. It lets a vendor tell you what is achievable inside it, propose a phased shape when it is not, or decline early rather than spending three weeks producing a response for a project that was never fundable. Withholding it produces proposals

scoped against a guess, and the comparison exercise then measures how well each vendor guessed.

Timeline

MILESTONE	TARGET DATE	FIXED OR FLEXIBLE
Contract start		
Discovery complete		
Content model signed off		
First content in the new system		
Feature complete		
Content freeze begins		
Cutover		
Hypercare ends		
Old platform switched off		

11 Explicitly out of scope

BUYER

Name what this project does not cover. Explain exclusions and identify any later phase, so vendors can price the same boundary.

- ☐ Visual redesign
- ☐ New brand or design system
- ☐ Copy rewriting or content strategy
- ☐ SEO content work beyond preserving what exists
- ☐ Migration of *(name the systems staying put)*
- ☐ Mobile app work
- ☐ E-commerce or checkout
- ☐ Personalisation
- ☐ Ongoing hosting after hypercare
- ☐ Ongoing feature development after launch

If a redesign and migration are both needed, ask vendors to price them as separable phases and explain the sequencing dependencies.

PART TWO

02

The response schedule

What every vendor answers, in one order,
so three responses can be read side by side.

Instruct vendors to answer in this order, using these headings and numbers. Comparability is the point.

12 Scope and deliverables

VENDOR

- 01 State the scope in your own words, in under 300 words. *This is the comprehension check. A vendor who restates the brief accurately has read it.*
- 02 List every deliverable, with a one-line definition of "done" for each.
- 03 Name what you have assumed. Assumptions that turn out false are the usual route to a change request; declaring them now is what makes the price meaningful.
- 04 Name what you have excluded.
- 05 Confirm the accessibility conformance level you are committing to and how it is verified.
- 06 Where the brief includes a redesign, price the replatform and the redesign as separable phases.

13 Content migration approach

VENDOR

- 01 How will you build and validate the content inventory?
- 02 How will content be transformed? Describe the pipeline, including what runs automatically and what needs a human.
- 03 What proportion of items do you expect to migrate automatically, and what proportion needs manual handling? State the basis.
- 04 How are rich text, embedded components, and inline media handled?
- 05 How are references between entries preserved?
- 06 How is media migrated, and what happens to filenames and alt text?
- 07 Describe the verification step that compares migrated content against the original before cutover. Who runs it, against what sample size, and what is the pass threshold?
- 08 How are content changes made during the build reconciled at cutover? Describe the delta import.
- 09 What is your rollback position if verification fails?
- 10 Price a content-inventory-and-mapping phase separately, so the number can be compared across bidders.

Ask for a worked verification example if the proposed method, sample size or acceptance threshold is unclear.

14 Integration approach

VENDOR

For each integration in the register:

- 01 Approach, and whether you have built this integration before.
- 02 What you need from the system owner, and by when.
- 03 Whether it lands day one or in a later phase.
- 04 What happens if the third-party API changes during the project.
- 05 Who holds the credentials, and how they are rotated.
- 06 Price per integration, so the register can be re-scoped without reopening the whole quote.

15 Redirect and search continuity plan

VENDOR

- 01 How is the URL inventory assembled, and from which sources?
- 02 How is the redirect map produced, reviewed, and signed off?
- 03 Where do redirects execute? (*CDN, edge, application, web server — the answer changes latency and who can change a rule after launch.*)
- 04 How are redirect chains collapsed?
- 05 How is the map tested before cutover?
- 06 What is monitored after cutover, by whom, and for how long?
- 07 What is your commitment on redirect retention? *Google's guidance is at least one year.*
- 08 How are titles, meta descriptions, canonical tags, structured data, and hreflang carried across?
- 09 What is the plan for a ranking drop in week two?
- 10 Is a pre-launch crawl comparison included, and what tooling?

16 Editorial workflow, roles, and permissions

VENDOR

- 01 How are the roles in Section 5 expressed in the target platform?
- 02 Can permissions be scoped below the level of a content type? Show how.

- 03 How is the approval workflow configured, and can it differ per brand or region?
- 04 How is the audit trail produced, and is it immutable?
- 05 Is versioning and rollback available to editors without a developer?
- 06 How is scheduled publishing handled?
- 07 What can an editor change without a deployment? What needs one?
- 08 How is a preview of unpublished content produced?

Question 7 is the one that decides whether the platform solves the problem that started the project. A system where a new page layout requires a release has moved the bottleneck rather than removed it.

17 Training and enablement

VENDOR

- 01 Who is trained, in what groups, and for how long.
- 02 Format: live, recorded, written, or a mix.
- 03 What documentation is delivered, and who owns it afterwards.
- 04 Is there a train-the-trainer path for a large editor base?
- 05 How is training scheduled against cutover? *Include time to practise before go-live and a refresher where the schedule requires one.*
- 06 What is the plan for editors who join after the project ends?
- 07 Is a sandbox environment provided for practice?
- 08 Price training separately, per group.

18 QA and acceptance

VENDOR

- 01 What is tested, by whom, and in which environments.
- 02 Automated test coverage: what is covered and what is not.
- 03 Accessibility testing method, including whether assistive technology is used and whether disabled users are involved.
- 04 Cross-browser and device matrix.
- 05 Performance testing method and the load profile used.

- 06 Security testing included, and whether a third-party penetration test is in scope.
- 07 How defects are classified and what severity blocks a release.
- 08 The acceptance procedure: who signs, against what criteria, and what happens when acceptance is withheld.
- 09 How much client-side UAT effort you assume, in person-days.

Point 9 is a cost to you that appears in no vendor's price. Ask for the number so it can be resourced rather than discovered.

19 Cutover and rollback

VENDOR

- 01 The cutover runbook, hour by hour, with named owners.
- 02 Is a rehearsal included, and how many?
- 03 Content freeze: how long, and what is frozen.
- 04 The DNS, TLS, and CDN sequence.
- 05 When redirects are deployed relative to DNS.
- 06 What is monitored during the window and by whom.
- 07 The rollback trigger: who decides, on what evidence, inside what window.
- 08 How long the old platform must stay available, and in what state.
- 09 Communication plan: who tells the organisation, and when.
- 10 Out-of-hours arrangements, and whether they carry a premium.

20 Hypercare and ongoing support

VENDOR

- 01 Hypercare duration and what it covers.
- 02 Response and resolution targets by severity, with the hours they apply in.
- 03 The escalation path, with names and roles.
- 04 Whether the delivery team stays on during hypercare, or the work transfers to a support desk. *If it transfers, say when and how knowledge moves.*
- 05 What is included and what is billed.

- 06 What the handover pack contains: repositories, credentials, infrastructure as code, runbooks, architecture decision records, documentation, and recordings.
- 07 Ongoing support options after hypercare, priced.
- 08 Hosting and infrastructure: who owns the accounts, and what happens to them at the end of the engagement.
- 09 Monitoring and alerting: what is in place, who receives alerts.
- 10 Confirm the client can operate the platform without you, and describe what makes that true.

Point 10 is the question that separates a handover from a dependency. Ask for the evidence, and read the answer to point 6 against it.

21 Team, ways of working, and references

VENDOR

- 01 Named team, roles, and the percentage of time each is allocated.
- 02 Which named people are on the project and which are on the pitch.
- 03 Location and time-zone overlap with our team.
- 04 Subcontractors used, and for what.
- 05 Sprint cadence, ceremonies, and what we are expected to attend.
- 06 Reporting: what we receive, how often.
- 07 How scope changes are raised, priced, and approved.
- 08 Three references from comparable migrations, with contactable names.
- 09 One migration that went badly, what happened, and what changed afterwards. *Ask for lessons that changed the proposed delivery method.*

22 Commercials

VENDOR

Price against this schedule so the numbers can be compared.

LINE	FIXED / T&M / ESTIMATE	PRICE
Discovery and content inventory		
Content model and architecture		
Platform configuration and build		

LINE	FIXED / T&M / ESTIMATE	PRICE
Front-end build		
Content migration — automated		
Content migration — manual handling		
Integrations (<i>itemised per Section 14</i>)		
Redirects and search continuity		
Accessibility conformance work		
QA and testing		
Penetration test (<i>if in scope</i>)		
Training (<i>per group</i>)		
Cutover, including rehearsals		
Hypercare		
Documentation and handover		
Project management		
Contingency		
Total		

Also state:

- 01 Payment schedule and what triggers each payment.
- 02 Day rates by role, for work outside the fixed scope.
- 03 What a change request costs and how long it takes to price.
- 04 Currency, and who carries exchange-rate movement.
- 05 Expenses policy.
- 06 Third-party costs you will pass through: licences, hosting, tooling.
- 07 Annual run cost after launch, itemised, for three years.

The last line is the one that changes decisions. A build price that wins on the spreadsheet and carries a licence model that scales with seats, locales, or API calls can be the more expensive option by year two. Ask for the three-year figure and model it against the platform you are leaving.

Three-year comparison basis. Complete the companion workbook on one currency and tax basis. Confirm whether “Year 1” starts at contract award or go-live and use the same definition for every bidder. Ask vendors to state the usage assumptions behind each annual price: editors, locales, traffic, storage, API calls and environments.

Include implementation once, then the three annual run costs. List licences, hosting, support, internal operating effort, old-platform overlap, and any exit allowance separately. Enter 0 only for a confirmed zero cost; leave an unknown blank and request clarification. Remove any cost already included in another line. This is an undiscounted comparison, not a cash flow forecast. Record exclusions and sensitivity to usage growth.

23 Contract terms: IP, data, and exit

VENDOR

01 Who owns the code at the end. *State it plainly.*

02 Who owns the content and the data.

03 Licences required to run the platform, named, with their commercial model and current published pricing.

04 Any component you retain rights to that we depend on.

05 Open-source licences in the delivered stack.

06 Where our data is stored and processed, including sub-processors.

07 DPA position.

08 Exit terms: notice period, what we receive, in what format, how long it takes.

09 Warranty period and what it covers.

10 Liability cap and insurance held.

PART THREE

03

Evaluating the responses

The scoring model, the patterns worth a clarification call, and a workable process timeline.

24 Weighted scoring matrix

Mandatory criteria come first. Record conditions that cannot be traded against price, such as a required data location, a launch deadline, or an accessibility commitment. Name the evidence and owner for each. Decide how clarifications and exceptions are handled before issuing the RFP. A high weighted score does not override an unmet mandatory criterion.

MANDATORY CRITERION	EVIDENCE REQUIRED	DECISION OWNER

Weighted evaluation. Agree and publish weights before responses arrive. The following is a starting model for an implementation procurement. Score each vendor independently, then record the panel's agreed score and the proposal page or demonstration that supports it.

CRITERION	WEIGHT	WHAT A STRONG ANSWER CONTAINS
Understanding of the brief	10%	Section 12.1 restates the scope accurately; assumptions are specific rather than boilerplate
Content migration approach	20%	A named pipeline, a stated automatic/manual split with a basis, and an operational verification step
Integration approach	10%	Priced per integration; names what is needed from each system owner and by when
Redirects and search continuity	10%	Sources for the URL inventory, where redirects execute, monitoring after cutover, a retention commitment
Editorial workflow fit	10%	Answers 16.2 and 16.7 concretely; shows the mechanism rather than asserting the capability
Cutover and rollback	10%	An hour-by-hour runbook, a rehearsal, and a rollback trigger with a named decision maker
Training and hypercare	10%	Training timed close to go-live; a handover pack that supports operating without the vendor
Team and references	10%	Named people with allocations; a candid answer to 21.9
Commercials	10%	A complete schedule, a three-year run cost, and a change-request process with a price

The example weights total 100%. Adjust them to your situation and say so in the brief. A project against a hard end-of-life date might move weight to cutover and hypercare. A project whose trigger was an editorial bottleneck should carry more on workflow fit.

Scoring guidance. Score each criterion 0–5.

SCORE	MEANING
5	Meets the requirement with specific evidence and a credible method for the stated risks
4	Meets the requirement with evidence; minor clarifications remain
3	Addresses the requirement, with limited evidence or unresolved assumptions
2	Partially addresses the requirement; material gaps remain
1	Asserts capability without a method or evidence
0	Not addressed

Calculation. Weighted points = score / 5 × weight in percentage points. For example, 4/5 on content migration at a 20% weight earns 16 points. Add all weighted points for a total out of 100. Leave a score blank until it has been assessed; use 0 only when the answer has been assessed as not addressed. The companion workbook withholds totals until all scores are entered and the weights total 100%.

25 Red flags

Record these as clarification questions. Assess the answer and evidence before deciding whether the gap affects eligibility, price or score.

- The response restates your brief back to you without adding a single question, assumption, or constraint of its own.
- Migration is described as an export and an import, with no transformation step.
- No verification step comparing migrated content against the original.
- Redirects appear once, in a bullet list, with no owner and no method.
- The price leaves uncertainty unallocated and states no assumptions.
- Accessibility appears as a claim rather than a conformance level and a verification method.
- The named team in the response is not the team in the presentation.
- Hypercare means a support inbox with no response targets.
- The three-year run cost is missing, or arrives as "depends on usage" with no model.
- Exit terms are absent, or the vendor retains rights to something you depend on.
- The reference projects do not demonstrate the complexity required here.
- Experience claims arrive without an example or supporting evidence.

26 RFP process timeline

Illustrative working-day schedule. Adapt dates to your procurement route, required notice periods, complexity and bidder access. Confirm response time with procurement before publishing the RFP.

STAGE	WORKING DAYS	NOTES
Brief finalised internally	—	Parts 1 and 3 complete before issue
RFP issued	Day 0	Use the procurement route agreed for this organisation
Vendor questions open	Days 1–7	Single channel
Answers circulated to all bidders	Day 10	Same answers to everyone
Data-room access for shortlisted vendors	Days 10–12	Read-only CMS, sitemap, analytics export
Responses due	Day 25	Confirm adequate response time with procurement and bidders
Scoring	Days 26–32	Score independently, then reconcile
Presentations	Days 33–40	Ask for the named delivery lead in the room
Clarifications	Days 41–45	
Award and debrief	Day 50	Debrief the unsuccessful bidders; you may need them next time

APPENDICES

04

The working sheets

Column sets for the content inventory, the integration register, the redirect map, and the clarification log.

Appendix A — Content inventory sheet, column set

COLUMN	PURPOSE
ID	Stable identifier in the current system
URL	Current live address
Title	
Content type	
Owner	Business owner, not the author
Last modified	
Last published	
Pageviews, 12 months	Drives the migrate/archive/drop call
Organic entrances, 12 months	
Inbound links	External links pointing at this URL
Conversions	Where measurable
Languages	
Word count	
Rich text present	
Embedded components	Which ones
Media count	
Documents attached	
References out	Entries this one points at
References in	Entries pointing at this one
Decision	Migrate / archive / drop
Decision owner	
Decision date	
Notes	

Appendix B — Integration register, column set

COLUMN	PURPOSE
System	
Vendor	
Purpose	
Direction	Inbound, outbound, bidirectional
Method	REST, GraphQL, webhook, SFTP, embedded script
Auth	
Data exchanged	
Personal data involved	Drives the DPA and records-of-processing work
System owner, internal	
Owner informed of this project	Yes / no / date
Contract renewal date	
Environment parity	Is there a non-production instance to build against
Day one or later phase	
Replacement candidate	Whether this project is the moment to replace it
Notes	

Appendix C — Redirect map, column set

COLUMN	PURPOSE
Old URL	
New URL	
Status code	301 unless there is a reason
Source	Sitemap, Search Console, analytics, crawl, manual
Traffic, 12 months	Prioritises review effort
Inbound links	
Chain collapsed	Whether this replaced an existing redirect
Rule type	Exact match or pattern
Executes at	CDN, edge, application, web server
Tested	Date and by whom
Verified post-cutover	Date and by whom
Retire date	Not earlier than 12 months after cutover

Appendix D — Clarification log

#	DATE	VENDOR	QUESTION	ANSWER	CIRCULATED TO ALL

Sources

- Google Search Central, Site moves with URL changes. Guidance on URL mapping, redirect retention and monitoring during a move.
<https://developers.google.com/search/docs/crawling-indexing/site-move-with-url-changes>
- Google Search Central, Redirects and Google Search.
<https://developers.google.com/search/docs/crawling-indexing/301-redirects>
- W3C, Web Content Accessibility Guidelines 2.2. <https://www.w3.org/TR/WCAG22/>
- W3C, Evaluating Web Accessibility Overview. Use a defined evaluation scope and a combination of automated and human evaluation. <https://www.w3.org/WAI/test-evaluate/>

Weights, examples and the process timeline are editable WAYF starting points. They are not external benchmarks or procurement requirements.

Published by WAYF. We build content platforms and run CMS migrations for enterprises and institutions. If it is useful, take it, change it, and send it to your shortlist under your own name — attribution is welcome and not required.

wayf.ai