Which system or partner should we choose, and can we defend the choice?

Choose a finance system or partner, and be able to defend the choice: you start from Arpero's ready-made content, and every document carries your own name. Arpero's people join you when you want them.

An organisation chooses a finance system or a partner once in years, so the knowledge and the time for it are rarely in-house. Suppliers' material is plentiful, and it is hard to see which of them fit an organisation of your size and kind. The first decision comes quickly; the research behind it takes far longer, and many roles have to come together before anyone signs. **With RFP Head Start,** you start from what Arpero has already researched, and you end with documents that are your own and a choice you can explain.

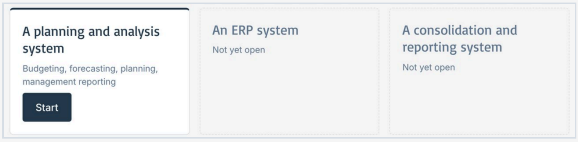
HOW YOU USE IT

On your own: your team answers what the documents need, in your own time and in any order. Or with Arpero's people: they join you for any step, including the work before the request for proposal.

HOW IT WORKS

1	**What are you choosing?**	Pick the system or the partner, and its ready-made content opens.
2	**What the documents need.**	Every question your request for information and your request for proposal ask, each with where its answer usually comes from.
3	**Requirements, suppliers and how you will choose.**	Keep, change or add to a ready-made list of requirements. Start your long list from a draft made with AI, each name with its source and why it is there, for you to check. Set your knock-outs and weights, each with its reason.
4	**Your documents.**	A request for information and a request for proposal in Word and as a PDF, and the forms suppliers answer in Excel.
5	**Answers and short list.**	Load each supplier's answers. Answers to your request for information are sorted against your Musts and knock-outs; answers to your request for proposal are scored by the method it published. Move each supplier towards the short list, with your reason.

WHAT YOU CAN CHOOSE



Each choice comes with its own ready-made content: the questions, the chapters, the requirements and where to look for suppliers. **Planning and analysis is open now.**

Choose your next finance system or partner, and stand behind the choice.

WHAT ARPERO BRINGS:

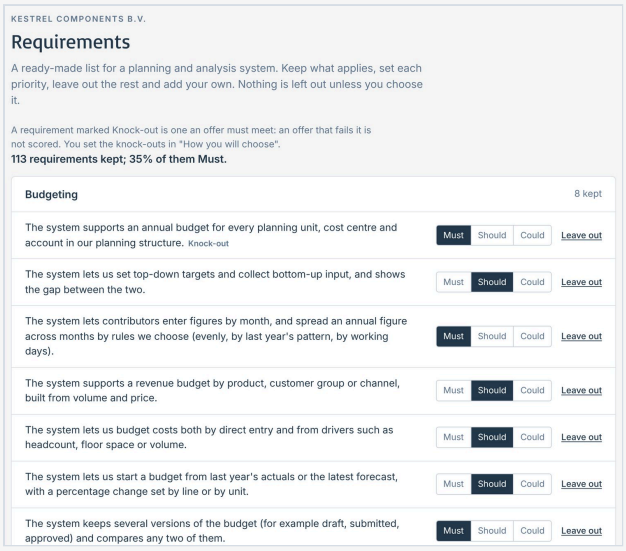
Ready-made content: the questions, chapters and requirements you start from, researched for each choice.
Your own name: on every page and in the files themselves; Arpero is not named in them.
Criteria set before the answers come in: your knock-outs, criteria and weights are in your request before the first answer arrives, and any later change is recorded with its date and reason.
People when you want them: Arpero's people, for any step, on request.

Start from research already done.

Arpero arperocompany.com

What comes back: a choice you can defend, in documents that are yours

In Word, to edit, and as a PDF, with the response forms in Excel. Anything not yet answered is marked “To complete”, so the documents show what they still need.



KESTREL COMPONENTS B.V.

Requirements

A ready-made list for a planning and analysis system. Keep what applies, set each priority, leave out the rest and add your own. Nothing is left out unless you choose it.

A requirement marked Knock-out is one an offer must meet: an offer that fails it is not scored. You set the knock-outs in “How you will choose”.

113 requirements kept; 35% of them Must.

Budgeting	8 kept			
The system supports an annual budget for every planning unit, cost centre and account in our planning structure. Knock-out	**Must**	Should	Could	Leave out
The system lets us set top-down targets and collect bottom-up input, and shows the gap between the two.	Must	**Should**	Could	Leave out
The system lets contributors enter figures by month, and spread an annual figure across months by rules we choose (evenly, by last year’s pattern, by working days).	**Must**	Should	Could	Leave out
The system supports a revenue budget by product, customer group or channel, built from volume and price.	Must	**Should**	Could	Leave out
The system lets us budget costs both by direct entry and from drivers such as headcount, floor space or volume.	Must	**Should**	Could	Leave out
The system lets us start a budget from last year's actuals or the latest forecast, with a percentage change set by line or by unit.	Must	**Should**	Could	Leave out
The system keeps several versions of the budget (for example draft, submitted, approved) and compares any two of them.	**Must**	Should	Could	Leave out

YOUR TEAM'S TIME GOES WHERE IT COUNTS

Nobody starts from a blank page

A ready-made list of requirements for your choice: keep what applies, set each priority, leave out the rest and add your own.



Kestrel Components B.V.

Request for proposal

A planning and analysis system

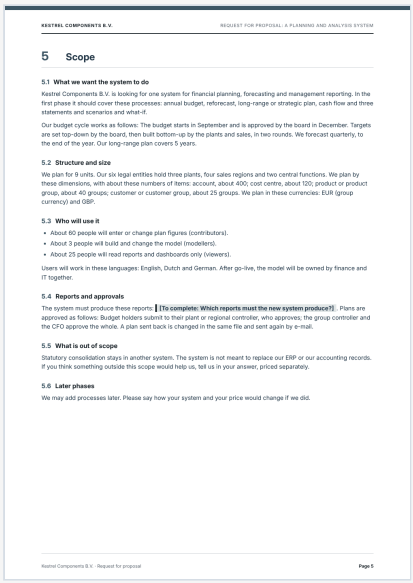
ISSUED BY	Kestrel Components B.V.
DATE OF ISSUE	28 October 2026
CONTACT	Anna de Vries, Group Financial Controller a.devries@kestrel-components.example
ANSWERS BY	29 January 2027

Confidential. For the suppliers invited by Kestrel Components B.V., to prepare their answer only.

Kestrel Components B.V. · Request for proposal — Page 1

Documents your board and your suppliers read as yours

The cover, every page and the file itself carry your organisation's name only.



KESTREL COMPONENTS B.V. — REQUEST FOR PROPOSAL: A PLANNING AND ANALYSIS SYSTEM

5 Scope

5.1 What we want the system to do

Kestrel Components B.V. is looking for one system for financial planning, forecasting and management reporting. In the first phase it should cover these processes: annual budget, reforecast, long-range or strategic plan, cash flow and three statements and scenarios and what-if.

Our budget cycle works as follows: The budget starts in September and is approved by the board in December. Targets are set top-down by the board, then built bottom-up by the plants and sales, in two rounds. We forecast quarterly, to the end of the year. Our long-range plan covers 5 years.

5.2 Structure and size

We plan for 9 units. Our six legal entities hold three plants, four sales regions and two central functions. We plan by these dimensions, with about these numbers of items: account, about 400; cost centre, about 120; product or product group, about 40 groups; customer or customer group, about 25 groups. We plan in these currencies: EUR (group currency) and GBP.

5.3 Who will use it

- About 60 people will enter or change plan figures (contributors).
- About 3 people will build and change the model (modelers).
- About 25 people will read reports and dashboards only (viewers).

Users will work in these languages: English, Dutch and German. After go-live, the model will be owned by finance and IT together.

5.4 Reports and approvals

The system must produce these reports: **[To complete: Which reports must the new system produce?]** . Plans are approved as follows: Budget holders submit to their plant or regional controller, who approves; the group controller and the CFO approve the whole. A plan sent back is changed in the same file and sent again by e-mail.

5.5 What is out of scope

Statutory consolidation stays in another system. The system is not meant to replace our ERP or our accounting records. If you think something outside this scope would help us, tell us in your answer, priced separately.

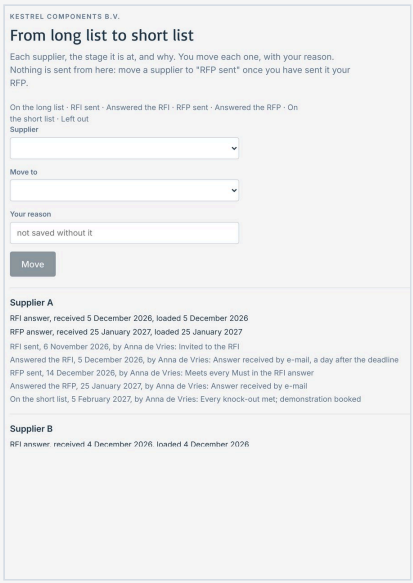
5.6 Later phases

We may add processes later. Please say how your system and your price would change if we did.

Kestrel Components B.V. · Request for proposal — Page 5

You see what is still open before anything goes out

Every place still to complete is marked in the text, so you can finish it in Word.



KESTREL COMPONENTS B.V.

From long list to short list

Each supplier, the stage it is at, and why. You move each one, with your reason. Nothing is sent from here: move a supplier to “RFP sent” once you have sent it your RFP.

On the long list · RFI sent · Answered the RFI · RFP sent · Answered the RFP · On the short list · Left out

Supplier

Move to

Your reason

not saved without it

Move

Supplier A

RFI answer, received 5 December 2026, loaded 5 December 2026

RFP answer, received 25 January 2027, loaded 25 January 2027

RFI sent, 6 November 2026, by Anna de Vries: Invited to the RFI

Answered the RFI, 5 December 2026, by Anna de Vries: Answer received by e-mail, a day after the deadline

RFP sent, 14 December 2026, by Anna de Vries: Meets every Must in the RFI answer

Answered the RFP, 25 January 2027, by Anna de Vries: Answer received by e-mail

On the short list, 5 February 2027, by Anna de Vries: Every knock-out met; demonstration booked

Supplier B

RFI answer, received 4 December 2026, loaded 4 December 2026

A short list you can explain

Every move towards the short list is saved with your reason and its date. Answers to your request for proposal are scored by the method it published, and you confirm or change each score.

Example pages, for an invented company.

Your suppliers’ answers stay with you. They are read on your computer, and are not sent to Arpero or to any AI service.

Start with planning and analysis. Arpero sets RFP Head Start up for your organisation, with the parts you need; the price follows what you take.

Write to **info@arpero.co.uk**.

Start at **rfp.arperotools.com**. RFP Head Start is open by invitation. Not invited yet? Use Request an invitation on the same page.

Arpero
arperocompany.com