

Frontline Enablement Technology RFP Template

Architect a technology ecosystem that supports real work, every shift.

This template helps you make smarter technology decisions for frontline teams by focusing on how work gets done as well as the critical results your business must achieve through frontline performance.

Frontline environments are fast-paced, unpredictable, and constrained by time, access, and operational pressure. Employees are often customer-facing, constantly interrupted, and expected to perform with limited support. They rely on shared devices, inconsistent connectivity, and fragmented systems that were never designed for how the job actually works.

Most RFP processes fail the frontline.

- They prioritize features over usability.
- They treat key enablement functions like training, communication, recognition, and operations as separate systems.
- They assume employees have time to engage with tools that don't fit the flow of work.

This template takes a different approach. It is built for enablement — the systems, support, and experiences that help people do their jobs well every shift.

Use this document to evaluate how technology:

- fits into real workflows and moments that matter
- reinforces knowledge and behavior over time
- connects training, communication, and operations into a single experience
- enables managers to lead, coach, and support performance
- functions within real frontline constraints

If a solution cannot deliver value in these conditions, it will not deliver value.

1. HOW TO USE THIS TEMPLATE

This template is designed to support decision-making, not just document requirements.

Work through the sections in sequence to define your needs, evaluate potential solutions, and make a clear, defensible decision. The early sections focus on understanding your frontline environment and the outcomes you need to achieve. The later sections guide vendor evaluation, demonstration, and final selection.

Before engaging vendors, review each section with your internal team. This ensures your requirements are grounded in real workflows and aligned to business priorities, rather than shaped by vendor messaging.

As you work through the template:

- base all inputs on how work actually gets done, not assumptions or ideal scenarios
- focus on specific tasks and high-impact moments where performance matters most
- clearly define constraints such as time, access, devices, and connectivity
- prioritize must-have requirements over nice-to-have features
- use your defined use cases to guide provider responses and demonstrations
- evaluate solutions based on how they perform in real conditions, not how they are presented
- use a structured scorecard or evaluation method to compare options consistently

Template Structure

This template is organized to guide you from problem definition through final decision:

1. How to Use This Template
2. RFP Overview
3. Problem Statement
4. Desired Outcomes
5. Frontline Audience Profile
6. Frontline Work Environment
7. Priority Use Cases
8. Enablement Capabilities
9. Experience Requirements
10. AI Requirements
11. Integration and Data Requirements
12. Implementation Requirements
13. Vendor Response Instructions
14. Demonstration Guidance
15. Decision Framework

2. RFP OVERVIEW

ORGANIZATION / TEAM	
RFP PROCESS OWNER	
KEY STAKEHOLDERS	
TECHNOLOGY CATEGORY	
CURRENT SOLUTION (if applicable)	
REASON FOR CHANGE	
TARGET LAUNCH WINDOW	
TARGET DECISION DATE	

3. PROBLEM STATEMENT

Define the core problem this technology must solve.

Avoid generic statements. Focus on what is actually happening in the operation.

What is happening today?

Describe how work is currently supported (or not supported).

Example: Employees rely on outdated documents and inconsistent communication to complete tasks.

Who is affected?

Example: Store associates, supervisors, and district managers across 150 locations.

What are the consequences?

Example: Errors, inconsistent execution, rework, increased manager workload.

What business results are impacted?

Example: Customer satisfaction, compliance, operational efficiency.

5. FRONTLINE AUDIENCE PROFILE

Describe the people this solution must enable.

ROLE(S)	
SCALE	
LOCATION(S)	
LANGUAGE(S)	
DIGITAL LITERACY	

DEVICE ACCESS	
TIME AVAILABLE DURING SHIFT	
MANAGER SUPPORT MODEL	

6. FRONTLINE WORK ENVIRONMENT

Describe when and where the work happens as well as the constraints that impact everyday performance.

Where does work happen?

Stationary, mobile, customer-facing, back-of-house?

What is the pace of work?

Steady, high-volume, unpredictable?

What disruptions commonly exist?

Customer challenges, equipment issues, staffing issues, network connectivity, competing priorities?

What devices are used on the job?

Shared devices, kiosks, desktop computers, wearables, personal smartphones?

7. PRIORITY USE CASES

Define the moments where this solution must deliver value. If a solution cannot perform well in these scenarios, it will fail.

USE CASE	SCENARIO	USER	TRIGGER / ACTION	DEVICE	SUCCESS MEASURE

8. ENABLEMENT CAPABILITIES

This section defines how the solution must support a connected enablement ecosystem, not a collection of separate tools.

Frontline performance is not driven by a single system or function. It is the result of how training, communication, operations, and support come together to enable people do their jobs effectively every shift.

Most technology evaluations break these areas apart. RFP documents are commonly cluttered with laundry lists of feature requirements that do not add up to a cohesive, right-fit enablement experience.

This template takes a different approach. Rather than focus on narrow features, it defines the core capabilities required to:

- support work in the moment
- reinforce knowledge and behavior over time
- align communication and execution
- enable managers to guide performance
- provide visibility into what is actually happening

This allows you to explore more options for architecting the right experience instead of searching for the perfect platform. Providers can then describe how they specifically enable frontline performance within real conditions:

- during active work
- under time pressure
- on available devices
- within existing constraints

Generic feature lists and legacy requirements are not sufficient on the frontline.

A. ENABLEMENT IN THE FLOW OF WORK

The solution must support performance on the job, not just away from the operation.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Rapid access to information	≤ 10 seconds	Employees need answers in the moment	Demonstrate during live scenario
Minimal disruption to workflow	Seamless access	Employees cannot step away from tasks	Observe workflow usage

Contextual delivery of support	Workflow awareness	Reduces searching and decision fatigue	Show contextual relevance
Consistent experience across moments	Same experience regardless of entry point	Prevents confusion	Test multiple access paths

Guidance: Support must meet employees where work happens. If it requires stepping away from the task, it will not be used consistently.

B. CONTINUOUS LEARNING AND REINFORCEMENT

Learning must be ongoing and embedded into everyday work.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Short, focused learning experiences	≤ 3 minutes	Fits into limited time during shifts	Review content examples
Reinforcement over time	Continuous	Prevents knowledge decay	Show reinforcement model
Adaptive delivery	Based on performance	Improves relevance and efficiency	Demonstrate personalization
Practice opportunities	Low-risk application	Builds confidence and retention	Show practice workflows

Guidance: Learning is not a one-time event. It must be reinforced continuously to support performance.

C. COMMUNICATION AND ALIGNMENT

Communication must drive action, not just awareness.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Targeted communication	Role, location, or context-based	Avoids irrelevant messaging	Demonstrate targeting

Clear connection to action	Linked to tasks or behaviors	Ensures execution	Observe action linkage
Confirmation of understanding	Beyond “seen” status	Ensures alignment	Validate confirmation methods
Reinforcement of key messages	Campaign capabilities	Sustains impact over time	Review campaign tools and cadence

Guidance: If communication does not lead to action, it does not support performance.

D. TASK EXECUTION AND OPERATIONAL SUPPORT

The solution must support the execution of work, not just preparation for it.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Task assignment and tracking	Simple and clear	Ensures accountability	Demonstrate task workflows
Clear instructions and guidance	Easy to follow	Reduces errors	Observe instruction clarity
Visibility into priorities	Easily understood	Helps employees focus	Review task prioritization
Validation of completion	Minimal effort	Confirms execution	Show completion tracking

Guidance: Execution drives results. The solution must support employees in completing work correctly and consistently.

E. PERFORMANCE SUPPORT AND KNOWLEDGE ACCESS

Employees must be able to perform tasks correctly in real time.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Searchable knowledge	Answers in seconds	Supports real-time decisions	Test search scenarios
Managed contribution	Scale knowledge sharing	Scales and grounds knowledge management across operation	Review authoring and social tools
Guided workflows	Step-by-step support	Reduces errors	Demonstrate workflows
Content accuracy and consistency	Always up to date	Prevents conflicting actions	Validate governance

Guidance: Access to information is only valuable if it is fast, accurate, and immediately usable.

F. MANAGER ENABLEMENT

Managers must be equipped to lead, coach, and support performance.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Visibility into team performance	Clear and actionable	Enables timely decisions	Review dashboards and reporting
Identification of performance gaps	Prioritized insights	Focuses effort where needed	Demonstrate insights
Coaching support	Integrated into workflow	Improves team capability	Review coaching tools
Alignment with daily routines	Fits into huddles and workflows	Ensures consistent use	Validate integration

Guidance: Managers translate expectations into execution. If they are not enabled, the solution will not drive performance.

G. RECOGNITION AND MOTIVATION

The solution should reinforce on-the-job behaviors that drive results.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
In-the-moment recognition	Fast and simple	Reinforces behavior immediately	Demonstrate recognition flow
Peer and manager recognition	Accessible to all roles	Builds engagement	Review recognition features
Sustained engagement mechanisms	Ongoing participation	Prevents drop-off	Evaluate long-term engagement tools

Guidance: Recognition should be timely, relevant, and tied to performance — not a separate program.

H. FEEDBACK AND LISTENING

The solution must capture and action frontline input.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Quick feedback capture	≤ 1 minute	Fits into workflow	Test feedback flow
Anonymous input options	Available where needed	Encourages honesty	Validate anonymity
Trend visibility	Aggregated insights	Identifies patterns	Review reporting
Follow-up actions	Visible response	Builds trust	Confirm action tracking

Guidance: Feedback must lead to action. Otherwise, employees will stop sharing their opinions.

I. DATA AND PERFORMANCE INSIGHTS

Data must power decisions, not just reporting.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Role-based dashboards	Relevant insights	Improves usability	Review dashboards
Identification of trends and gaps	Prioritized insights	Drives action	Demonstrate analysis
Cross-functional visibility	Integrated data	Supports ecosystem view	Validate data sources
Actionable recommendations	Clear next steps	Reduces interpretation effort	Review outputs

Guidance: If data requires interpretation before action, it will not be used consistently.

Final Principle

Enablement cannot be effectively delivered through a single feature, function, or platform.

Right-fit support is drive through the purposeful blend of capabilities that:

- support work in the moment
- reinforce behavior over time
- align communication and execution
- enable managers to lead
- provide visibility into performance

The purpose of the RFP process is not to identify the perfect solution or find the one platform that can do everything. The goal is to identify tools that work together to enable performance as part of a connected ecosystem.

9. EXPERIENCE REQUIREMENTS

This section defines how the solution must perform in real frontline conditions.

Technology fails on the frontline when it is technically capable but practically unusable. Employees do not have time to navigate complex interfaces, search through menus, or troubleshoot access issues during a shift. If something takes too long, requires too many steps, or interrupts the work, it will not be used.

These requirements establish clear expectations for usability, speed, access, and fit within the workflow.

J. Access and Speed

Frontline employees must be able to access what they need immediately, often during active work.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Time to access critical information	< 10 seconds	Employees often have seconds, not minutes, to find answers during customer interactions or while completing complex processes	Demonstrate live retrieval of information during a use case scenario
Time to complete common actions	< 30 – 60 seconds	Tasks must fit within natural moments in the workflow, not require dedicated time away	Measure during demo scenarios
System responsiveness	Immediate or near real-time	Delays reduce trust and adoption	Observe system latency during demo

Guidance: If an employee cannot access and act within seconds, they will default to guessing, asking a coworker, or skipping the step entirely.

K. NAVIGATION AND EASE OF USE

The solution must be intuitive enough for first-time use in a high-pressure environment.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Steps to complete core actions	≤ 3 – 5 steps	Complex navigation creates friction	Demo key workflows during

Search / prompt effectiveness	Relevant results within first attempt	Employees will not refine search terms or prompt entries repeatedly	Test search / prompting using real frontline language
Interface clarity	Minimal training	Users should not need formal instruction	Observe first-time users

Guidance: Assume the user is under pressure, distracted, and possibly new to the job. If they need to “figure it out,” the solution will not scale.

L. WORKFLOW INTEGRATION

The system must fit into the way work actually happens.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Simplified authentication	Options for SSO, biometrics, swipes	Employees struggle to remember large numbers of login credentials	Demo authentication options
Ability to use system during work	Seamless integration	Employees cannot step away from tasks	Demo real workflow scenarios
Contextual relevance	Content aligned to current task	Reduces searching and decision fatigue	Show contextual content delivery
Minimal disruption	No need to switch between systems	Fragmentation reduces efficiency	Observe number of systems involved in task completion

Guidance: The solution should feel like part of the job, not an additional task layered on top of it.

M. DEVICE AND ACCESSIBILITY REQUIREMENTS

The solution must function across the devices used on the frontline.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Shared device support	Fully functional without device setup	Many employees do not have dedicated devices	Demonstrate on shared device

Mobile compatibility	Full functionality on mobile devices	Many users rely on personal or mobile access	Test workflows on mobile
Shift awareness	Integration with scheduling tools	Many employees are not permitted to complete work activities unless on shift	Demo schedule integration
Offline capability	Core functions without connectivity	Connectivity is often inconsistent	Demonstrate offline use cases
Low-bandwidth performance	Minimal degradation	Ensures reliability in constrained environments	Simulate low connectivity

Guidance: Design for the lowest common denominator, not the ideal environment.

N. LANGUAGE AND INCLUSIVITY

The solution must support a varied workforce.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Language support	All required languages available	Ensures comprehension and adoption	Demonstrate language switching
Ease of understanding	Clear, simple language used throughout	Reduces errors and confusion	Consider in all demos
Accessibility support	Meets internal and regulatory standards	Ensures usability for all employees	Validate accessibility features

Guidance: If employees cannot easily understand the solution, they will not use it correctly.

O. FIRST-TIME USER EXPERIENCE

The solution must work immediately for new users.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Time to first successful action	≤ 2 minutes	New employees need immediate confidence	Observe first-time user completing a task
Need for formal training	Minimal to none	Training time is limited and inconsistent	Evaluate onboarding requirements
Clarity of next steps	Obvious and guided	Reduces hesitation and errors	Observe user flow without instruction

Guidance: Assume a new hire on day one, during a busy shift. If they cannot succeed immediately, the solution will not scale.

P. MANAGER USABILITY

Managers must be able to use the solution quickly and effectively without added burden.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Time to review team performance	≤ 2 – 3 minutes	Managers have limited time for analysis	Demo dashboards, reporting
Ease of coaching actions	Simple and actionable	Managers need to act quickly	Show coaching workflow
Integration into daily routines	Fits into existing workflows	Avoids adding extra work	Observe real usage scenarios

Guidance: If the solution creates more work for managers, it will not be used consistently.

Q. FAILURE AND EDGE CASE HANDLING

The system must remain usable when things go wrong.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Error handling	Clear and actionable	Prevents frustration and abandonment	Trigger and observe error scenarios
Recovery from failure	Fast and simple	Ensures continuity of work	Test recovery workflows
Degraded performance mode	Usable under constraints	Maintains functionality in poor conditions	Simulate edge cases

Guidance: Frontline environments are unpredictable. The system must remain usable even when conditions are not ideal.

Final Principle

The frontline does not adapt to technology. Technology must adapt to the frontline.

If a system requires time, attention, or conditions that do not exist in the work environment, it will fail — regardless of its features.

10. AI REQUIREMENTS

Artificial intelligence (AI) should enhance the enablement ecosystem by improving speed, relevance, and decision-making. It should reduce friction, not introduce complexity or risk.

This section defines how AI must support rapid, accurate access to information and guidance, along with personalization and automation, within real frontline conditions.

A. ROLE OF AI IN THE ENABLEMENT ECOSYSTEM

AI should enable frontline performance in three primary ways:

1. Enable rapid access to accurate, relevant information and guidance
2. Personalize experiences based on behavior and context
3. Automate routine actions to reduce manual effort

AI is not a replacement for:

- human judgment
- manager coaching
- operational decision-making

Guidance: If AI slows down access, introduces uncertainty, or requires extra effort to use, it is not adding value.

B. RAPID ACCESS TO INFORMATION AND GUIDANCE

AI must enable employees to quickly find and apply the information they need during active work.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Provide fast access to relevant information and guidance	≤ 5 – 10 seconds	Employees need immediate support during tasks and interactions	Test retrieval using real frontline scenarios
Deliver information in a usable format	Clear, concise, actionable	Information must be applied instantly, not interpreted	Review output clarity in context

Surface the right information with minimal effort	No complex navigation or repeated searches	Reduces friction and cognitive load	Observe number of steps required
Maintain accuracy and consistency	Aligned with current policies and procedures	Prevents errors and conflicting actions	Validate against known standards
Provide source visibility where appropriate	Users can verify information if needed	Builds trust and reduces risk	Confirm access to source references

Guidance: The goal is not just to retrieve information, but to make it immediately usable in the moment.

C. CONTEXTUAL AND ADAPTIVE DELIVERY

AI should tailor information and guidance based on real conditions.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Adapt outputs based on role, location, or task	Context-aware delivery	Reduces irrelevant information	Test across multiple scenarios
Adjust based on user behavior and performance	Reflect real needs over time	Improves relevance and efficiency	Review adaptive logic
Anticipate needs based on patterns	Proactive delivery where appropriate	Reduces search and delay	Demonstrate predictive capabilities

Guidance: Information should be delivered in context, not just made available.

D. AUTOMATION AND WORKFLOW SUPPORT

AI should streamline work by automating routine processes and enabling faster execution.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Automate repetitive or low-value actions	Reduce manual effort	Frees time for higher-value work	Demonstrate automation workflows
Trigger actions based on events or conditions	Respond to real-time inputs	Enables proactive support	Show trigger-based scenarios
Integrate automation into existing workflows	Seamless experience	Avoids fragmentation across systems	Validate workflow integration

Guidance: Automation should reduce friction without removing visibility or accountability.

E. MANAGER ENABLEMENT THROUGH AI

AI should help managers interpret information and take timely action.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Highlight performance gaps and trends	Actionable insights	Saves time and improves focus	Demonstrate insight generation
Recommend next actions	Clear and practical guidance	Supports decision-making	Review recommendation quality
Summarize complex data	Simplified outputs	Reduces cognitive load and administrative effort	Validate summaries

Guidance: AI should guide managers toward action, not overwhelm them with data.

F. CONTENT SUPPORT AND MAINTENANCE

AI may support the creation, organization, and maintenance of content.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Generate draft content or summaries	Accelerate content creation	Reduces development time	Review outputs
Translate content accurately	Support multilingual workforce	Improves accessibility	Validate translations
Maintain consistency across content	Align with standards	Ensures reliability	Review governance controls

Guidance: AI can assist, but human validation remains essential.

G. GUARDRAILS AND GOVERNANCE

AI must operate within clearly defined boundaries.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Human oversight for critical outputs	Required where risk exists	Prevents errors and misuse	Review control mechanisms
Data privacy and security compliance	Meets organizational standards	Protects sensitive data	Validate policies
Explainability of outputs	Users understand how information is generated	Builds trust	Test explanations
Role-based access and permissions	Controlled usage	Ensures appropriate application	Review permissions model

H. LIMITATIONS AND FAILURE MODES

Vendors must clearly identify where AI may not perform reliably.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Known limitations documented	Transparency	Prevents misuse	Review documentation
Handling of incorrect or incomplete information	Clear fallback options	Maintains reliability	Test edge cases
Escalation to human support	Available when needed	Ensures continuity	Validate escalation process

Failure Prompt: When does the system fail to deliver accurate or usable information, and what happens next?

I. EXPERIENCE REQUIREMENTS FOR AI

AI must meet the same usability expectations as the overall system.

- Information must be delivered quickly and clearly
- Outputs must be immediately actionable
- Interaction must require minimal effort
- No specialized training should be required to use AI features

Guidance: If accessing information through AI feels slower or more complex than other methods, adoption will fail.

Final Principle

AI should make information easier to access, understand, and apply. If it introduces friction, confusion, or uncertainty, it is not ready for the frontline.

11. INTEGRATION AND DATA REQUIREMENTS

This section defines how the solution must connect with existing systems and how data must flow across the enablement ecosystem.

Frontline enablement does not happen in a single platform. Training, communication, operations, HR systems, and reporting tools all contribute to how work gets done. If these systems are not connected, employees experience fragmentation, managers lack visibility, and organizations struggle to drive consistent performance.

The point is not integration for the sake of integration. Rather, the goal is to ensure that:

- information flows to where work happens
- data reflects real performance, not isolated activity
- systems work together as a unified experience

A. INTEGRATION STRATEGY AND APPROACH

Define the role this solution will play within your broader ecosystem.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Clear role within ecosystem	Defined as primary, supporting, or integrated system	Prevents redundancy and overlap	Review system architecture
Integration approach defined	API-based, middleware, or direct integration	Impacts scalability and flexibility	Review technical approach
Supports modular ecosystem design	Can integrate without requiring full replacement of existing systems	Reduces disruption and cost	Validate integration flexibility

Guidance: Avoid selecting a system that attempts to replace everything unless it can realistically deliver across all required functions.

B. SYSTEMS OF RECORD AND DATA OWNERSHIP

Define where key data lives and how it is managed.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Clear system of record for employee data	Typically HRIS or HCM	Ensures data consistency	Confirm source of truth
Clear system of record for performance data	Defined based on use case	Prevents conflicting data	Validate ownership model
Defined data ownership and governance	Assigned roles and responsibilities	Reduces risk and confusion	Review governance structure

Guidance: Multiple systems can use data, but only one should own it.

C. DATA FLOW AND SYNCHRONIZATION

Ensure data moves seamlessly across systems.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Real-time or near real-time data synchronization	Minimal delay	Enables timely decisions and actions	Test sync timing
Bi-directional data flow where needed	Data can move between systems	Supports full ecosystem functionality	Validate data exchange
Automated data updates	Minimal manual intervention	Reduces errors and workload	Review automation processes
Data accuracy and consistency	No duplication or conflict	Ensures reliability	Test data alignment

Guidance: If data is delayed, inconsistent, or manually updated, the system will not support real-time performance.

D. USER PROVISIONING AND ACCESS MANAGEMENT

Ensure employees can access the system easily and consistently.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Automated user provisioning	Based on role, location, and / or employment status	Reduces administrative effort	Demonstrate provisioning process
Support for shared device environments	Flexible access without individual setup	Reflects frontline reality	Validate shared access workflows
Single sign-on (SSO) support	Simplified authentication	Reduces friction and login issues	Test login experience
Role-based access control	Permissions aligned to responsibilities	Ensures appropriate access	Review access model

Guidance: If accessing the system requires effort, employees will avoid it.

E. WORKFLOW AND EXPERIENCE INTEGRATION

Ensure systems work together from the user's perspective.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Seamless user experience across systems	Minimal switching between tools	Reduces friction and confusion	Observe workflow execution
Embedded access within existing tools	Integration into systems already used	Increases adoption	Demonstrate embedded use
Consistent interface and interaction patterns	Familiar experience across touchpoints	Improves usability	Review UI consistency

Guidance: Integration is not just technical. It must feel seamless to the user.

F. REPORTING AND DATA CONSOLIDATION

Ensure data can be used to drive decisions.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Consolidated reporting across systems	Unified view of performance	Enables better decision-making	Demonstrate reporting outputs
Role-based dashboards	Relevant insights for each user group	Improves usability	Review dashboards
Ability to export and integrate data	Supports broader analytics	Increases flexibility	Test export functionality
Alignment of metrics across systems	Consistent definitions and calculations	Prevents confusion	Validate metric alignment

Guidance: *If reporting is fragmented, managers and stakeholders will be less likely to trust the data.*

G. SCALABILITY AND FLEXIBILITY

Ensure the system can evolve with the organization.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Scales across locations and roles	Supports growth and expansion	Ensures long-term viability	Review scalability examples
Supports new integrations over time	Adaptable architecture	Prevents future limitations	Validate extensibility
Handles increasing data volume	Maintains performance	Ensures reliability	Test performance under load

Guidance: *The system should grow with your ecosystem, not constrain it.*

H. SECURITY AND COMPLIANCE

Ensure data is protected and managed responsibly.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Compliance with organizational standards	Meets internal and external requirements	Reduces risk	Review certifications
Data encryption and protection	Secure data handling	Protects sensitive information	Validate security protocols
Regional data center hosting	In-region data centers aligned with your locations	Meet regional data storage requirements	Review data center locations
Audit capabilities	Track access and changes	Supports compliance and accountability	Demonstrate audit logs

I. FAILURE MODES AND DEPENDENCIES

Understand what happens when integrations fail.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Graceful handling of integration failures	System remains usable	Ensures continuity	Test failure scenarios
Clear dependency mapping	Identify critical integrations	Reduces risk	Review architecture
Fallback options for critical functions	Alternative workflows available	Maintains operations	Validate fallback processes

Failure Prompt: What happens if a key integration fails during a shift?

Final Principle

An enablement ecosystem only works if it is connected.

If systems operate in isolation, employees experience friction, managers lack visibility, and performance suffers — regardless of the quality of individual tools. Integration is not a technical requirement. It is a performance enabler.

12. IMPLEMENTATION REQUIREMENTS

This section defines how the solution must be deployed, adopted, and sustained within real frontline environments.

Going “live” is not the sign of a successful implementation. Success should be measured by whether employees use the solution consistently, managers rely on it to guide action, it improves performance during everyday work, and it drives measurable business results.

A providers implementation approach must reflect frontline realities:

- limited time for training
- high turnover
- distributed teams
- operational pressure

If the rollout requires ideal conditions, it will fail.

A. IMPLEMENTATION STRATEGY AND APPROACH

Define how the solution will be introduced into the organization.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Clear implementation strategy	Phased, pilot-based, or full rollout defined	Reduces risk and improves adoption	Review implementation plan
Alignment with operational calendar	Avoid peak periods and disruptions	Prevents operational impact	Validate rollout timing
Defined success criteria for rollout	Measurable adoption and usage goals	Ensures accountability	Review success metrics
Cross-functional alignment	L&D, Operations, IT, HR aligned	Prevents silos during rollout	Confirm stakeholder involvement

Guidance: A phased rollout with clear learning loops is often more effective than a full launch.

B. PILOT AND VALIDATION APPROACH

Ensure the solution is tested in real conditions before scaling.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Pilot conducted in representative environments	Reflects real frontline conditions	Ensures relevance	Review pilot design
Clear pilot objectives and metrics	Defined success criteria	Enables decision-making	Validate pilot goals
Feedback captured from frontline users	Direct input from employees and managers	Improves solution fit	Review feedback process
Iteration based on pilot results	Adjustments made before scaling	Reduces risk	Confirm iteration plan

Guidance: A pilot should test usability, fit, and impact, not just functionality or opinion.

C. FRONTLINE ADOPTION STRATEGY

Define how employees will start using the solution.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Minimal initial training required	≤ 10 – 15 minutes	Reflects limited time availability	Review onboarding approach
Immediate value at first use	Clear benefit in first interaction	Builds confidence and adoption	Observe first-use experience
Integration into daily workflows	Used during existing tasks	Ensures consistent usage	Validate workflow alignment
Clear expectations for usage	Defined behaviors and standards	Drives consistency	Review communication plan

Guidance: If employees do not see value immediately, they will not return.

D. MANAGER ENABLEMENT AND ENGAGEMENT

Managers are the most important factor in successful adoption.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Managers trained on how to use the system	Focus on practical application	Enables effective leadership	Review training approach
Managers understand their role in adoption	Clear expectations defined	Drives accountability	Validate communication
Solution supports manager workflows	Fits into huddles, coaching, and daily routines	Ensures sustained use	Observe manager workflows
Managers receive actionable insights	Clear next steps provided	Improves effectiveness	Review dashboards

Guidance: If managers do not use the solution, frontline employees will not use it consistently.

E. TRAINING AND ONBOARDING APPROACH

Define how employees and managers will learn to use the system.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Short, focused onboarding content	≤ 5 minutes per topic	Fits into frontline schedules	Review training materials
Delivered in the flow of work	Accessible during shifts	Increases completion rates	Validate delivery method
Reinforcement over time	Ongoing support after launch	Improves retention and application	Review reinforcement plan
Support for new hires	Integrated into onboarding	Sustains adoption	Confirm onboarding integration

Guidance: Training should be embedded into the experience, not treated as a separate event.

F. COMMUNICATION AND LAUNCH STRATEGY

Define how the rollout will be introduced and reinforced.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Clear launch messaging	Explains purpose and value	Builds understanding and buy in	Review messaging
Targeted communication by role	Relevant to each audience	Improves engagement	Validate segmentation
Reinforcement of key messages	Ongoing communication	Sustains awareness	Review cadence
Integration with existing channels	Uses familiar touchpoints	Increases reach	Confirm channel usage

Guidance: Launch is not a single event. It is the beginning of ongoing reinforcement.

G. CHANGE MANAGEMENT AND BEHAVIOR ALIGNMENT

Ensure the solution drives behavior change, not just system usage.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Clear definition of desired behaviors	Specific actions identified	Aligns system to performance	Review behavior definitions
Alignment with operational processes	Integrated into the workflow	Ensures consistency	Validate process alignment
Removal of conflicting processes	Eliminate redundancy	Reduces friction	Confirm process changes
Incentives or reinforcement tactics	Encourage adoption	Drives engagement	Review reinforcement plan

Guidance: Technology does not change behavior on its own. It must be aligned with how work is managed.

H. SUPPORT MODEL AND ISSUE RESOLUTION

Define how users will receive support.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Clear support channels	Defined points of contact	Ensures quick resolution	Review support structure
Fast response times	Timely issue resolution	Maintains trust	Validate SLAs
Self-service support options	Quick access to help	Reduces dependency	Test support tools
Escalation paths	Defined for critical issues	Prevents disruption	Confirm escalation process

I. PERFORMANCE MONITORING AND CONTINUOUS IMPROVEMENT

Ensure the solution evolves over time.

REQUIREMENT	TARGET	WHY IT MATTERS	VALIDATION
Track adoption and usage	Actionable metrics	Identifies gaps	Review reporting
Monitor impact on performance	Link to business outcomes	Demonstrates value	Validate metrics
Capture ongoing feedback	Input from users	Drives improvement	Review feedback loops
Continuous optimization	Regular updates and adjustments	Sustains effectiveness	Confirm improvement process

Guidance: Implementation is not complete at launch. It is an ongoing process.

Final Principle

Implementation is where strategy becomes reality.

If the solution cannot be introduced, adopted, and sustained within real frontline conditions, it will not deliver value — regardless of its capabilities.

Your goal is to change how work gets done in service of business outcomes, not just launch a new tool.

13. VENDOR RESPONSE INSTRUCTIONS

This section defines how vendors must respond to an RFP and how responses will be evaluated.

All requirements have been defined in previous sections. This information ensures those requirements are addressed with sufficient clarity, depth, and evidence to support a meaningful evaluation.

Remember: your RFP is not a request for a feature list. It is a mandate for evidence of real-world impact.

A. RESPONSE STANDARD

All responses must reflect how the solution performs in real frontline conditions.

Vendors must:

- describe how capabilities function during active work, not in ideal conditions
- reflect time constraints, device limitations, and workflow realities
- provide detail sufficient for evaluation without additional clarification

Minimum expectation: A response should allow a reviewer to understand exactly how a frontline employee would use the system in a real scenario.

B. REQUIRED RESPONSE STRUCTURE

Each response must include the following elements:

- 1) How it works: Describe the user experience step-by-step, from the perspective of a frontline employee or manager.
- 2) Where it works: Identify device types (shared, mobile, kiosk, desktop), connectivity conditions, any environmental constraints
- 3) Time to complete: Provide realistic estimates for accessing information, completing tasks, navigating workflows
- 4) Constraints and limitations: Clearly identify where the capability may not perform well, required conditions for optimal performance, dependencies on configuration, data, or integrations
- 5) Availability status: Indicate whether the capability is available out of the box, configurable, requires customization, planned, or on the roadmap

C. RESPONSE QUALITY EXAMPLES

Do not allow providers to reuse stock responses or provide generic answers to your questions. Instead, hold them accountable for quality responses with a useful level of detail at all times.

Insufficient response:

“The platform provides mobile access and supports real-time communication.”

Acceptable response:

“Users can access the platform via mobile web and iOS/Android apps. On average, it takes 6–8 seconds to load key content. Messages are delivered in real time, but delivery may be delayed in low-connectivity environments. Offline access is not supported.”

D. PROOF AND VALIDATION REQUIREMENTS

All technology provider claims must be supported by evidence.

Acceptable forms of proof include:

- Live demonstrations
- Recorded workflows
- Screenshots tied to specific use cases
- Customer examples with similar operating environments
- Measurable outcomes

Evaluation rule: Claims without supporting evidence will be treated as unverified and may be excluded from consideration.

E. LIMITATIONS DISCLOSURE (NON-NEGOTIABLE)

Providers must explicitly disclose the following information:

- Known system limitations
- Scenarios where performance degrades
- Required conditions that may not exist in frontline environments
- Features that depend on future development or additional cost

Evaluation rule: Failure to disclose limitations will be considered a significant risk and may impact vendor selection.

F. RESPONSE COMPLETENESS

All sections of an RFI / RFP document must be completed in full.

- “Not applicable” responses must include justification

- References to external materials must be clearly linked to specific requirements
- Partial responses will be considered incomplete

Evaluation rule: Incomplete responses may be excluded from further consideration.

G. DEMONSTRATION READINESS

Vendors must be prepared to demonstrate capabilities in real-time scenarios.

Demonstrations must:

- Follow defined use cases
- Include time-constrained workflows
- Simulate first-time user interactions

Important: Demonstrations must reflect actual solution behavior. Scripted or idealized demonstrations may be challenged or rejected.

H. EVALUATION CRITERIA

Responses should be evaluated based on:

- Alignment to defined frontline conditions
- Clarity and specificity
- Demonstrated usability and speed
- Transparency regarding limitations
- Evidence supporting claims

Priority weighting:

- Real-world usability over feature breadth
- Demonstrated performance over stated capability

I. SUBMISSION REQUIREMENTS

Technology providers must submit:

- Completed RFP document
- Supporting documentation
- Customer references (if available)
- Evidence required to validate responses

Final Principle

This RFP guideline is designed to help you evaluate how solutions perform in real frontline conditions.

The objective is not to identify the platform with the most features. Instead, you must identify the solution that can be used consistently, supports performance effectively, and fits within the realities of the operation.

Providers should respond with this standard in mind.

14. DEMONSTRATION GUIDANCE

This section provides guidance on how to approach provider demonstrations for frontline technology solutions.

This is an opportunity to understand how the solution performs in the moments that matter most — when employees are under pressure, time is limited, and the business relies on their performance.

Most product demonstrations are designed to highlight strengths and avoid friction. They are often highly scripted, pre-configured, and disconnected from real-world conditions. As a result, they can create a misleading picture of how the solution will actually perform in your environment.

To get value from a demo, you must shift your focus. Do not evaluate what the system can do in theory. Evaluate how it behaves in practice.

What to Look For

Focus on how the solution supports real work, not how the salesperson presents it.

Pay close attention to speed and access. When an employee needs information or guidance, how long does it take to find it? Does the solution respond quickly, or is there noticeable delay? Even small delays add up in a frontline environment and quickly erode trust.

Observe the number of steps required to complete common actions. A solution that requires multiple clicks, navigation layers, or repeated searching will not hold up during a busy shift. What feels manageable in a demo environment often becomes friction in the field.

Watch how the solution fits into the flow of work. Does the user have to stop what they are doing to engage with the solution, or can they access what they need without breaking their workflow? Solutions that require employees to step away from the operation rarely get used consistently.

Evaluate the clarity and usability of information. When the solution surfaces content, is it immediately actionable, or does it require interpretation? Frontline employees do not have time to read through long explanations or compare multiple sources. The information must be clear, concise, and directly applicable.

Pay attention to the first-time user experience. Ask yourself whether a new employee, with little context or training, could successfully complete a task using the solution. If the demo requires excessive explanation from the presenter, that is a signal that the solution may not be intuitive enough.

Assess how the solution performs under realistic conditions. This includes shared devices, mobile usage, and inconsistent connectivity. Many solutions perform well in controlled environments (in an office or over Zoom) but struggle when conditions are less than ideal.

Observe how the solution handles imperfection and variation. What happens when the user enters incomplete information, makes a mistake, or encounters something unexpected? Frontline work is not linear, and the solution must be able to adapt.

Finally, consider the role of the manager experience. Can a manager quickly understand what is happening with their team and take action? Or does the solution require significant time and effort to interpret data and respond?

How to Approach the Demo

Rather than asking the provider to walk through their standard presentation, guide the demonstration using your own scenarios.

Start with a real situation from your operation. Describe it clearly, including the role, the task, and the time constraints. Then ask the provider to show how their system supports that situation from start to finish.

Avoid giving the provider too much time to prepare a perfect walkthrough. The goal is to see how the system behaves, not how well it can be staged.

Ask follow-up questions in real time:

- What happens if the user does this instead?
- Can you show that on a shared device?
- How long would this take in a real environment?

Encourage variation. Change the inputs, adjust the scenario, or introduce a constraint. This helps reveal how flexible and resilient the solution actually is.

Most importantly, focus on the user experience, not the presenter's explanation. If the value of the system depends on the provider explaining it, it probably will not scale.

Example Demo Request

Here is an example of how to frame a demo request in a way that reflects real frontline conditions:

Scenario: Accessing Information During a Customer Interaction

A store associate is assisting a customer who wants to return an item. The associate is not fully confident in the return policy for this situation and needs to confirm the correct process while the customer is waiting.

Please demonstrate how your solution supports this scenario.

The demonstration should:

- Start from the perspective of a frontline associate with no prior setup
- Reflect use on a shared or mobile device
- Show how the associate finds the relevant information
- Show how the information is applied to complete the interaction

As you demonstrate, we will be observing:

- How long it takes to access the information
- How many steps are required
- Whether the information is clear and actionable
- How well the experience fits within a live interaction

We may ask you to adjust the scenario or repeat parts of the workflow to better understand how the system performs under different conditions.

Final Principle

A strong demonstration makes the work feel easier. If the solution adds steps, creates hesitation, or depends on ideal conditions, those issues will only be amplified in the field.

15. DECISION FRAMEWORK

This section helps translate everything gathered through the RFP process into a clear, defensible decision.

At this stage, the goal is to interpret everything you have seen (demos, documentation, case studies) and determine which solution will work best in your environment and help you achieve your desired business outcomes.

Strong decisions are grounded in how work gets done, not how solutions are presented.

How to Make the Decision

The strongest solution is not the one with the most features or the most polished demonstration.

It is the one that consistently supports performance in real conditions. As you evaluate options, focus on:

- what the system enables employees to do in the moment
- how easily it fits into existing workflows
- whether it can be used consistently across locations, roles, and conditions

Small differences in usability, speed, and clarity often matter more than large differences in functionality.

A. FRONTLINE FIT

Does the solution work where the work happens?

Consider how the solution performs under real conditions:

- during active tasks, not just in isolation
- on the devices employees use every day
- within the time constraints of a typical shift

Look beyond whether the solution can deliver information or guidance. Focus on whether it does so quickly enough and clearly enough to be useful in the moment.

Key question: Can employees rely on this without slowing down their work?

B. USABILITY AND ADOPTION

Will people use it consistently, without being told to?

Adoption is driven by ease, not intent. Even a well-designed solution will fail if it requires too much effort to use.

Consider:

- how intuitive the system felt during first use
- whether tasks could be completed without explanation
- how much effort is required to return to the system over time

If users hesitate, search, or need guidance during the demo, those behaviors will increase in the field.

Key question: Will this become an essential part of the workflow, or something people avoid unless required?

C. MANAGER ENABLEMENT

Does the solution make it easier for managers to lead?

Managers are responsible for translating expectations into action. The system should help them do that more effectively, not add another layer of work.

Consider:

- how quickly managers can understand what is happening with their team
- whether the system clearly points to actions they should take
- how well it fits into existing routines such as huddles or coaching conversations

If the system requires significant time to interpret or manage, it will not be used consistently.

Key question: Does this help managers act, or just give them more stuff to do?

D. ECOSYSTEM ALIGNMENT

Does the solution simplify or complicate your environment?

Technology does not operate in isolation. It becomes part of a broader system of tools, processes, and data flows.

Consider:

- how well the solution integrates with existing systems
- whether it replaces or overlaps with current tools
- how data flows across the ecosystem

A strong solution should reduce fragmentation, not introduce new points of friction.

Key question: Does this make the ecosystem more connected or more complex?

E. IMPLEMENTATION REALITY

Can this solution be effectively rolled out and sustained within your frontline environment?

A solution that works in theory but cannot be implemented effectively will not deliver value.

Consider:

- the level of effort required to deploy and support the system
- how easily employees and managers can be onboarded
- whether the rollout approach fits within operational constraints

Be realistic about what your organization can support, not what is possible under ideal conditions.

Key question: Can we introduce this without disrupting the operation or overwhelming the team?

F. LONG-TERM VALUE

Will this solution continue to deliver value over time after launch?

The initial experience matters, but long-term sustainability matters more.

Consider:

- how the solution will scale across locations and roles
- its ability to adapt as needs evolve
- the level of partnership and support provided by the vendor

A solution should not just solve today's problem. It should continue to support performance as the organization changes.

Key question: Will this still be effective a year from now?

G. RISKS AND TRADEOFFS

Every solution comes with tradeoffs. The key is to make them explicit.

Identify:

- known limitations and constraints
- areas where the solution did not perform as strongly
- dependencies that may impact success

Some tradeoffs are acceptable. Others are not. The key is to understand them clearly before making a decision.

Key question: Which risks can we manage, and which would undermine success?

Decision Summary

Use the space below to document the thinking behind your final assessment.

What are the top strengths of selected solution?

What are your key risks or concerns?

Why was this solution selected?

How will you determine success post-implementation?