

Request for Proposal (RFP)

New Employee Onboarding & Process Training Program Development

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Issued By: Synergy Solutions Inc. (Human Resources & Operations)

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Proposal Submission Deadline: November 28, 2025, 5:00 PM EST

Template Checklist (For Reference Only)

Section	Present?
I. The General Training Goals	\$\checkmark\$
II. The Target Audiences	\$\checkmark\$
III. Objectives	\$\checkmark\$
IV. Project Details	\$\checkmark\$
V. Constraints on Budget, Schedule, and Design	\$\checkmark\$
VI. Resources Provided	\$\checkmark\$
VII. Criteria for Evaluating Success of the Training	\$\checkmark\$

VIII. Criteria for Selecting a Vendor	\$\checkmark\$
IX. Requests for Vendor Suggestion or Creativity	\$\checkmark\$
X. Terms and Conditions	\$\checkmark\$

I. The General Training Goals

Synergy Solutions Inc. is expanding rapidly. The general business goal is to ensure that all new hires achieve **full operational readiness** within **30 days** of their start date, reducing time-to-productivity by 50% compared to the previous ad-hoc system.

The new process involves the launch of our proprietary workflow automation platform, **TaskFlow** (see prior context). The training must integrate company culture, HR compliance, and technical proficiency with TaskFlow. This is a shift from our existing process, which relied heavily on siloed departmental guides and informal mentorship.

II. The Target Audiences

Primary Audience: New Hires (All Roles)

- **Job Summary:** Roles span Technical (Developers, Engineers) and Non-Technical (Sales, Marketing, Operations). All are expected to be highly proficient in using digital tools.
- **Change in Responsibilities:** All new hires will immediately use **TaskFlow** for time tracking, task delegation, and project status updates, which was previously handled via email/spreadsheets.

Secondary Audience: Departmental Managers

- **Change in Responsibilities:** Managers must be trained on how to effectively **monitor** team progress using the new system and conduct formal performance check-ins based on the data generated.

Training Volume

- **Total to be trained (Next 12 Months):** Approximately **80 individuals**.
- **Geographic Location:** 70% based remotely in **EST/CST time zones**; 30% based at our main HQ in **San Francisco, CA (PST)**.

III. Objectives

Upon successful completion of the training, the target audience will be required to perform the following:

1. **Cultural Integration:** The new hire will be able to articulate **Synergy Solutions' Mission, Vision, and Core Values** when questioned by an HR representative.
2. **Compliance:** The new hire will correctly complete all required **HR compliance modules** (e.g., data privacy, workplace conduct) with a minimum score of **90%** on the associated assessment.
3. **System Proficiency:** The new hire will successfully navigate the **TaskFlow platform** to create, assign, and update **three distinct types of tasks** accurately within the platform simulation.
4. **Process Adherence:** The new hire will correctly file their first week's expense report using the designated integrated system (if applicable) without needing clarification from Operations staff.

IV. Project Details

Needs and Task Analyses Summary

- **Needs Summary:** Current onboarding results in high HR query volume (averaging 5 hours/week support) and inconsistent TaskFlow adoption rates (currently below 60%).
- **Task Analysis:** Preliminary analysis suggests 15 critical tasks new employees must master across HR, IT setup, and TaskFlow usage.

Content and Suggested Treatment

- **Content:** Must cover Company History, Benefits Enrollment (HRIS integration required), Data Security Policy, and full TaskFlow MVP usage.
- **Suggested Treatment:** We seek a **blended learning approach**, leveraging interactive modules for compliance and scenario-based simulations for TaskFlow.

Project Team Organization

- **Your Team (Vendor):** Project Lead, Content Developer(s), Media Designer(s), QA/Testing Specialist.
- **Reporting Relationship:** The Vendor's **Project Lead** will report directly to **Dr. Evelyn Reed (CTO)** for technical sign-off and **Mr. Alex Chen (Head of HR)** for content approval.

Required Development Process and Revision Cycles

The vendor must adhere to a structured **Agile/Scrum** development process. We mandate **three formal review/revision cycles** corresponding to the Design, Draft Content, and Final Beta builds.

Listing of Expected Deliverables

- Finalized **Training Design Document (TDD)**.

- Complete set of **SCORM-compliant** learning modules ready for deployment on our LMS.
- **Facilitator/Trainer Guides** for the secondary audience (Managers).
- Final system assessment/test bank.

Standards of Quality and Quantity

Quality will be judged by successful completion rates in Objective III. Quantity is defined by the scope in Section III (covering all necessary content for initial 30-day readiness).

V. Constraints on Budget, Schedule, and Design

Budget Boundaries

The total allocated budget for **vendor fees** for the complete development and delivery of this training program is **\$25,000 USD**. Proposals significantly exceeding this amount will be at a competitive disadvantage.

Specific Milestone Dates

- **Design Plan Submission:** December 15, 2025
- **First Draft Content Review:** January 10, 2026
- **Final Master Deliverables to Field:** February 15, 2026

Implementation Plans

The training must be ready for rollout by **March 1, 2026**. The plan should account for remote delivery to EST/CST time zones and a separate, possibly in-person, session for the San Francisco team.

Constraints on Design

The final product **must be deliverable in a self-study, interactive e-learning format**, compatible with our existing **TalentLMS** platform (SCORM 1.2 standard required). Instructor-led sessions should be limited to manager enablement guides only.

VI. Resources Provided by Synergy Solutions Inc.

Synergy Solutions Inc. will provide the vendor with the following:

- **Subject Matter Experts (SMEs):** Dedicated access to Mr. Alex Chen (HR) and the TaskFlow Development Team Lead for all content clarification.
- **Technical Documentation:** Full access to the **TaskFlow MVP Specification Document** and **existing HR policy documents**.
- **Facilities/Equipment:** Access to a **TalentLMS sandbox environment** for content testing and deployment validation.
- **Market Research:** Preliminary internal surveys regarding new hire pain points.

VII. Criteria for Evaluating Success of the Training

The completed training program will be judged successful based on the following metrics, measured **60 days post-launch**:

1. **Time-to-Productivity:** New hires achieving **full TaskFlow proficiency** (as measured by system audit logs) within **30 calendar days**.
2. **HR Support Reduction:** A measured decrease of at least **40%** in recurring HR/Compliance support questions from employees onboarded post-training launch.
3. **Trainee Feedback:** Average satisfaction score of **4.0/5.0 or higher** on post-training surveys.

VIII. Criteria for Selecting a Vendor

Vendor selection will be based on the following criteria and weighting system:

Criterion	Weight (%)	Description
Vendor Quality (Samples/Portfolio)	35%	Evidence of high-quality instructional design and media production.
Proposed Solution Quality	30%	How well the proposed instructional strategy meets the objectives.
Vendor Price	20%	Competitiveness of the fixed fee relative to the scope.
Understanding of Subject Matter	15%	Demonstrated grasp of fast-paced tech startup environments.

IX. Requests for Vendor Suggestion or Creativity

We are relatively firm on the **self-study digital format** (Section V), but we are **highly flexible** regarding the *methodology* used to teach **Cultural Integration (Objective 1)**. We are uncertain if video storytelling or interactive scenario branching is more effective for this component. We

actively seek creative, high-impact, and scalable solutions in this area. Vendors should dedicate a specific paragraph to their novel recommendation for this cultural component.

X. Terms and Conditions

Contractual Terms

- **Intellectual Property (IP):** All **final, accepted deliverables** (e.g., final SCORM files, source materials created specifically for this project) will become the **sole property of Synergy Solutions Inc.** upon final payment.
- **Confidentiality:** Vendors must agree to a standard **Non-Disclosure Agreement (NDA)**, which will be issued to shortlisted candidates.
- **Payment Schedule:** Payment will be structured in three installments: **30%** upon contract signing, **40%** upon TDD approval (Jan 15, 2026), and **30%** upon final master deliverable acceptance (Feb 28, 2026).