01 / PROSPECT AND INTAKE

Category-based RFP evaluation

Prepared for QA Sample - Northstar Advisory (fictional) - 2026-11-04 I Workflow configuration v1

Proposed design · Fictional demonstration cases · No connected systems

THE CHALLENGE YOU DESCRIBED

> Manually finding comparable evidence in differently formatted proposals, chasing missing security answers, and reconciling category scores.

Monthly review of technology vendor RFP proposals within each service category using required evidence, weighted scoring, exception handling, and final procurement-lead authority.

MONTHLY CASES	STAFF MIN / CASE	STAFF HOURS / MONTH
80	90	120

Baseline: cases × active staff minutes ÷ 60. Current effort, not forecast savings.

Reported end-to-end time: three business days. Elapsed time, separate from staff effort.

WORKFLOW INTAKE

PDF / IMAGE

Vendor proposal PDF

Primary narrative proposal evidence and source for technical and delivery claims.

XLSX / CSV

Pricing spreadsheet

Primary structured pricing evidence for cost scoring and reconciliation.

PDF / XLSX / EML

Security questionnaire

Required security evidence and exception trigger source when answers are missing or problematic.

PDF / XLSX

Category scorecard

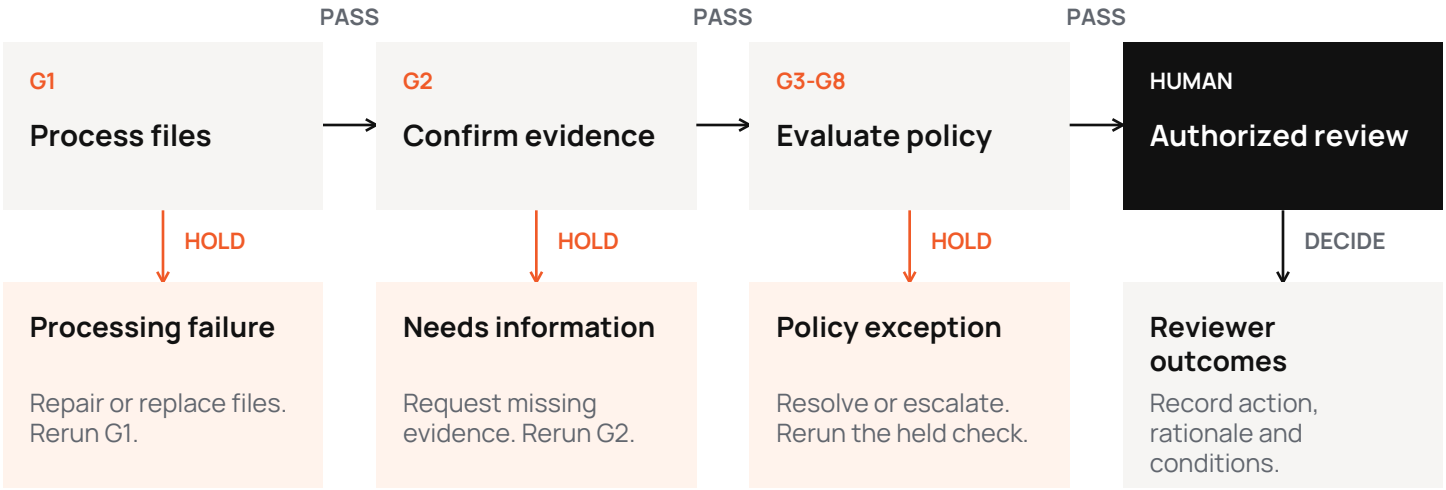
Authoritative category scoring template used to apply consistent weighted scoring within each service category.

Abridged design. Full workflow details in the linked interactive workspace.

02 / LOGIC AND EXCEPTIONS

From evidence to decision

Processing and completeness come first. Only ready cases reach policy evaluation.



CONFIGURED POLICY CHECKS

Pass all checks to prepare a recommendation; the reviewer owns the decision.

G3 All four required inputs are present and processing can proceed

Pass: Move to scoring and evidence review.

Hold: Place on hold until the missing evidence is…

G4 Proposal is evaluated only within its own service category

Pass: Continue with category-level scoring only.

Hold: Escalate for correction; do not compare across…

G5 Technical fit score is at least 3 out of 5

Pass: Eligible for shortlist consideration if all other rules pass.

Hold: Escalate to procurement lead with evidence an…

G6 Weighted threshold: at least 3.5 out of 5

Pass: Eligible for shortlist recommendation.

Hold: Escalate to procurement lead with evidence and rationale.

G7 Security requirement passes and no scoring exception is present

Pass: Proceed to recommendation.

Hold: Escalate to procurement lead with evidence an…

G8 Processing succeeds before scoring is finalized

Pass: Retain findings and decision history.

Hold: Suspend evaluation until the processing issue i…

Abridged design. Full workflow details in the linked interactive workspace.

03 / WORKSPACE AND NEXT STEPS

A reviewable case for every decision

Explore the actual DecisionFlo interface through the interactive link below.

INSIDE THE WORKSPACE

01 Evidence and findings

Source files, connected evidence and findings stay with the case.

02 Rules and exceptions

Per-rule outcomes explain what passed, what is missing and what needs review.

03 Human decision

Review path: Two analysts prepare the evidence and category scores. The procurement lead makes the final shortlist decision and reviews a…

04 History and handoff

Case events, decisions and workflow version support a traceable handoff.

WEIGHTED EVALUATION

Weights total 100%. Validate criteria and evidence before use.

Human assessment required for marked criteria; no score is inferred.

40% Technical fit

25% Delivery

25% Total cost

10% [human] Support

REVIEWER ACTIONS

Shortlist

Decline

Request information

Escalate

Record authorized override

NEXT STEPS

Confirm evidence and policy with the process owner. Test complete, incomplete and exception cases. Agree pilot measures and decision authority.

Contact DecisionFlo · decisionflo.ai/demo

Open the interactive workspace

Talk to DecisionFlo