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| The **Breakthrough** Series

Select with confidence:

A practical RFP framework for
H&S software



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What's “Breakthrough” All About?

CUT THROUGH THE NOISE. GET CLEAR ON WHAT MATTERS.

Whether you're weighing up options or navigating internal buy-in, this series is here to help you shift gears and drive real change — with practical tools, real stories, and honest conversations to get you moving forward.



Today's Agenda

Getting aligned internally

01

Is an RFP the right approach for
you?

02

What to include in your RFP

03

04

The pitfalls that catch most
teams out

05

How to evaluate responses

06

Is what you see what you get?



Before we start...

Where are you in your H&S software evaluation journey?



IF YOU'RE PRE-RFP

Building the Case Before the RFP

1

Lead with cost of inaction

The unreported incidents, manual reporting hours, regulatory exposure, the reputational risk of a serious incident with inadequate systems.

2

Speak the board's language

Translate safety metrics into terms the CFO and executive team measure success by.

3

Build cross-functional support early

Bring IT, Finance, and People & Culture in before the project reaches the leadership table.

Part 1

Getting Aligned Internally

The most common reason H&S software projects stall isn't a bad RFP – it's a lack of internal alignment before the RFP even goes out.

Secure an Executive Sponsor

Not awareness – active sponsorship. Someone senior enough to keep the project moving and navigate internal politics.

- ✓ Without a sponsor, evaluations lose focus and get deprioritised.
- ✓ Frame the case around business risk – not software features.
- ✓ Ask: what's the cost of the status quo? The regulatory exposure?

The framing that gets executive attention

"What's the operational cost of doing nothing?"

"What's our regulatory exposure right now?"

"What's the reputational risk if a serious incident happens with inadequate systems?"

Get Budget Recognised Early

Have the honest conversation with Finance before the evaluation starts – not after.

1

Full cost picture

License fee, implementation, internal resource time, training and ongoing cost of ownership – all of it, upfront.

2

Watch the IT cost

Some IT teams require H&S to fund an equivalent internal support fee – confirm this before you build your budget.

3

Match budget to expectations

A Corolla budget can't deliver Mercedes requirements. Do market due diligence before writing the RFP.

Decide Who's in the Room

Get it wrong and you'll either miss critical requirements or end up with a slow, contested process.

H&S Team

- Day-to-day users of the platform.

IT

- Technical implementation and integrations.

Finance / Procurement

- Manages the commercial process.

People & Culture

- If the platform covers anything related to workers' comp.

Don't forget frontline representation

Talk to workers about how they currently report incidents and what frustrates them — it surfaces requirements you won't find anywhere else. Worker consultation on safety systems is a legal requirement under Section 49 (Model H&S Act) and Section 60 (H&S at Work Act).

Get Clear on Who Does What

Without clear ownership, projects suffer from groupthink and “trying to please everyone” — leading to scope creep and bloated requirements.

1. Who owns the RFP process?
2. Who has input on requirements?
3. Who scores vendor responses?
4. Who makes the final decision?



A project lead and decision owner isn't bureaucracy — it's what keeps the process moving.

Part 2

Is an RFP the Right Approach for You?

An RFP is a significant investment of time — for your team and for the vendors responding to it. And in some situations, it's not the most efficient path to a good decision.

When an RFP Makes Sense — and When It Doesn't

RUN A FORMAL RFP

- The project is complex or multi-department.
- It's a significant financial commitment.
- You're in a high-risk regulatory environment.
- You need internal alignment on requirements.

CONSIDER A LIGHTER PROCESS

- Your needs are straightforward.
- You're replacing a well-understood system.
- You already have a strong preferred vendor.
- Speed matters more than broad comparison.

Approximately **70%** of organisations ecoPortal works with **go through a formal RFP process** .

The average evaluation involves **5 vendors** and takes between **8 and 20 weeks** from RFP release to decision.



Open vs Closed RFP

OPEN RFP

Any vendor can respond.

- Broadest possible market view.
- Often required in public sector.
- Trade-off: high response volume.

CLOSED RFP

You pre-select a shortlist.

- More control, higher-quality responses.
- Efficient – 3 to 5 vendors is the sweet spot.
- Risk: may exclude an unknown strong fit.

Not sure yet? Start with an RFI (Request for Information). A shorter, broader market scan that helps you shortlist realistic vendors before committing to a full RFP.

Part 3

What to Include in Your RFP?

The best RFPs aren't the longest ones.
Start with business outcomes, not a wishlist of features.

Key Criteria for Selecting a Platform

Most RFPs do a reasonable job covering core functionality, but consistently fall short in the areas that actually determine whether an implementation succeeds.

Research from Verdantix, who track the EHS software market globally, highlights five criteria that buyers should weigh when selecting a platform:

- Functional maturity across core and specialist modules.
- Frontline usability and the strength of the management control layer.
- Implementation capability and delivery.
- Configuration flexibility and adaptability.
- AI readiness and governance.

The Two Areas That Determine Success



Frontline Usability

Most RFPs are written by governance teams — not the workers who'll use the platform daily on the mobile app in the field.

Talk to your users, build in requirements around mobile experience, ease of use, and offline capability — then test them.



Implementation Partnership

H&S software isn't just a technical project. It involves workflow scoping, change management, training, and data migration.

Ask vendors to describe their onboarding methodology, share case studies, and explain their hardest implementation.

Areas Worth Building Into Every RFP

1

Business outcomes and must-haves

Separate deal-breakers from nice-to-haves.

2

Frontline usability

Tested by real users.

3

Your core H&S workflows

Test against your actual scenarios.

4

Configuration & adaptability

Can we make changes without the vendor?

5

Implementation & change management

Methodology, training, rollout sequencing.

6

Integrations & data

SSO, APIs, HRIS, data migration.

7

Vendor viability & partnership

Financial stability, customer success model.





Part 4

Pitfalls That Catch Most Teams Out

Even with a well-structured RFP, a few patterns consistently derail evaluations.

Pitfalls that Catch Most Teams Out

Wishlist brain dump

A 1,200-line document covering everything, missing the real problem.

Fix: Run a prioritisation conversation and for each item, ask 'is this a deal-breaker?'

Scoring the product, not the relationship

Most scorecards ignore implementation track record and vendor honesty. These matter enormously over a 3–5 year contract.

Treating TCO as an afterthought

Licence fees are easy to compare. Implementation, configuration and training costs can double the effective price — ask vendors to be specific.

Part 5

How to Evaluate What Comes Back

Once RFP responses land, the evaluation process itself is where a lot of teams lose objectivity.

How to Evaluate What Comes Back

1

Build a weighted scorecard

Agree criteria and weightings as a team before reading a single response. Weight what matters most to your organisation.

2

Read between the lines

Specific methodology and honest caveats signal a real partner. Polished claims of 'full compliance' on everything deserve scrutiny.

3

Use the compliance format

Full / Partial / Non-Compliant per requirement, with comments. A vendor marking everything 'Full' hasn't engaged honestly.

Part 6

Is What You See What You Get?

There's a real gap between a well-written proposal and a platform that performs in your environment. Close it before you sign.

Is What You See What You Get?

Run a scenario-based demo

"Show me how a contractor gets approved, raises an incident from mobile, triggers an investigation, and escalates to an offsite manager."

One real scenario exposes usability, workflow logic, mobile experience and reporting — in a way a feature checklist never can.

Plan for what comes after

- Run a short pilot or proof-of-concept — even 2–3 weeks surfaces issues a demo won't.
- Implementation is a project in itself: configuration, migration, training, change management.
- Ask for a realistic timeline, a detailed project plan, and their hardest past implementation

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Request for Proposal Template

Issuing Organisation:	[Your Organisation Name]
RFP Issue Date:	[Date]
Response Deadline:	[Date]
Point of Contact:	[Name, Email, Phone]
Submission Method:	[Email / Portal Link]

INSTRUCTIONS FOR VENDORS

1. Complete all fields in the 'RFP Requirements' tab. Do not delete or modify existing rows.
2. Use the 'Vendor Response' column to provide a detailed answer to each requirement.
3. In the 'Compliance' column, indicate one of: Fully Compliant / Partially Compliant / Non-Compliant / Future Roadmap.
4. Use the 'Comments / Evidence' column to provide supporting detail, screenshots, or documentation references.
5. Do not alter the formatting, structure, or formulas in this workbook.
6. Submit the completed workbook by the deadline listed above to the designated point of contact.
7. All responses become the property of the issuing organisation and may be used for evaluation purposes.

+ RFP Instructions RFP Requirements Evaluation Criteria

RFP Template

We've built an RFP template to go alongside everything we've covered today. Structured to help you run a smarter evaluation and compare vendors on what actually matters.

If you'd like us to send it to you, let us know in the poll on your screen now!



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Questions?

Enter them into the Q&A tab



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Thank you
For joining us!

