RFP GUIDE

HOW TO WRITE AN RFP
&
MANAGE THE VENDOR SELECTION PROCESS

**A REQUEST FOR PROPOSAL GUIDE
FOR DIGITAL MARKETERS**

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Digital Strategy

Web Development

Social Media Marketing

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PREFACE: A GUIDE FOR DIGITAL MARKETERS

Prior to the advent of the Internet, marketing and advertising was primarily a realm made up of television, print and display advertising as well as direct marketing via telephone and mail. Today, digital mediums have brought about a dizzying array of advanced, highly dynamic marketing channels served up by technologies that are enabling completely new and revolutionary marketing eco-systems. These developments have increased the complexity of the marketing landscape at an exponential rate, pressuring companies to increasingly turn to technology vendors and interactive marketing agencies to stay current and competitive.

Whether you are a company looking to begin the process of developing your interactive marketing from scratch or you are an experienced organization seeking to advance your existing programs, the process of searching for and evaluating potential partners can be fraught with difficulties. Interactive marketing and web development projects are generally complex and often choosing the right vendor or agency for the job is no less complicated or time consuming. Having been in the technology industry for many years, I've been through the process countless times – both as a client looking for a vendor and as a vendor bidding on a project. I've seen the very good, the very bad and just about everything in between. As more and more of my colleagues turned to me for advice on this subject, I developed this RFP guide in an effort to provide some assistance to those in need.

> *Writing a good request for proposal (RFP) and managing a well thought out process to select the right partner for your company can mean difference between a great success and a total disaster.*

Writing a good request for proposal (RFP) and managing a well thought out process to select the right partner for your company can mean difference between a great success and a total disaster for you and everyone involved. Here are some valuable tips and recommendations, along with some insight, to help you write a great RFP and manage the vendor selection process.

A note about terminology used here: this guide is generally applicable to RFPs intended for a variety of interactive marketing projects and initiatives of varying scope and type (e.g. email marketing, website development, social media marketing, overall digital strategy, etc.). For the purpose of readability, most of the references tend to use the terms "project" and "initiative", however the majority is just as applicable to campaigns, programs and so on. In some areas, supplemental notes are added where I felt it was important to address specific areas of application.

A WELL MANAGED RFP PROCESS IS MISSION CRITICAL

An RFP is a document commonly written by a company looking for a vendor (such as an agency, media management firm, technology developer, etc.) to bid on a project or fulfill a services need. As it stands today, that is pretty much where the commonality ends. While I've seen a few great RFPs, the unfortunate reality is that many companies don't quite know what information to provide or what questions to ask, much less understand the best way to go about such a process. Many bad RFPs don't supply much relevant information and often miss the target with an incorrect approach. It's important to know what information you need to supply and what information you'll need delivered back in order to perform the *right* analysis and make good decisions.

> *Commonly, the biggest mistake is to withhold any budget parameters to help set scope.*

Commonly, the biggest mistake is to withhold any budget parameters to help set scope. To use a simple analogy, you wouldn't contact a home builder and say "I can't give you any really detailed information about my needs or tell you what I can afford, but nonetheless I do expect you to give me an accurate blueprint and a price for my new house."

Writing a clear and sufficient RFP will allow vendors to competently gain a good understanding of your needs and give you a higher quality response (and greater accuracy on items affecting scope and budget). A properly planned approach will also help to significantly ease the overall vendor selection process and greatly improve your chance for the best possible outcome.

PREP WORK: ARE YOU TRULY READY TO ASK FOR PROPOSALS?

COMMON MISTAKE #1 – NOT A REAL PROJECT YET

Some people make the mistake of employing an RFP in a misguided effort to obtain an initial education and budget information for the purpose of making a business case for an initiative or project that hasn't be approved and committed to – and therefor doesn't technically exist yet. It might seem like a good idea, but in actuality it often creates a lot of unnecessary work for you and all others that you have tapped to respond. At this research stage, you are dealing with supposed details that are highly subject to changes and corrections. You may end up having to start the whole process over with a new RFP (that more accurately reflects the new, approved scope).

COMMON MISTAKE #2 – LOOSELY OR IMPROPERLY DEFINED

Jumping straight to asking for a proposal prior to doing the necessary work to properly define the project can be a dangerous practice. It can essentially hand over the key definition of the project to those who may be unfamiliar with your business and thus, they must make a lot of big assumptions because the ground work has not been done. You are the best person to

define your project and decide what is most important to reach your goals. Don't lose control of that.

To ensure your success, a little homework goes a long way. To develop a good understanding of the overall scope of your project, call vendors and colleagues to ask their opinion and advice to help you understand your major options as well as how some of the different components related to your initiative may have differing cost structures and ROI economics. Your understanding of these factors will help you prioritize needs and define a speculative budget range that you can realistically live with – important things you should communicate to your prospective vendors up front.

THE VALUE OF IDEAS AND OWNERSHIP OF INTELLECTUAL PROPERTY

If you are seeking big ideas and creative design submissions from prospective vendors as a part of your evaluation process, you will need to understand and establish what your position is on ownership of what is presented. Knowledge capital or intellectual property is a concept which asserts that ideas have intrinsic value which can be shared and leveraged within and between organizations. Typically, the exclusive rights to any intellectual capital begin with the creative source. So to put it plainly: any original vendor ideas and creative designs presented to you during an RFP process should be considered the exclusive property of the vendor until you pay for them. To approach this otherwise is to essentially restrict what vendors are willing to share with you, assuming they are willing to participate at all.

> *Original ideas and creative designs presented to you are considered the exclusive property of the vendor until you pay for them.*

QUICK OVERVIEW: THE REVIEW PROCESS & THE RFP

Below is a quick bullet point list to give you a quick snapshot of what to prepare and consider for your request for proposal. We'll examine each in detail later on in this guide.

PROCESS SNAPSHOT: THE STEPS TO VENDOR SELECTION

1. Create Selection Committee & Decision Criteria
2. Finalize Schedule of Events
3. Completion of an RFP
4. Create Initial Target List of Vendors
5. Creating The RFP Schedule
    a. Initial RFP Announcement/Send
    b. Submission Deadline
    c. 1st Round Proposal Review
    d. Narrow Down to Finalists
    e. Vendor Finalists Review

RFP SNAPSHOT: THE BASIC LIST OF WHAT TO INCLUDE

INFORMATION TO **PROVIDE** VENDORS IN AN RFP:

- Quick facts about your RFP
- Background on your organization
- Your contact information
- Schedule for this RFP process
- Criteria for making your decision
- Basic summary of the project, including overarching goals and timeline
- Project's target market, if applicable (customers, users, stake holders)
- Detailed overview of the project/initiative
    o Primary goal
    o Secondary goals
    o Budget
    o General scope
    o Time frame
    o Business requirements
    o Creative/design requirements

- o   Functional requirements
- o   Content type/Content development needs
- o   Existing technical environment/requirements
- o   Your preferred working relationship requirements
- o   Ongoing support and maintenance requirements

INFORMATION TO **REQUEST** FROM VENDORS IN AN RFP:

- Vendor company information
  - o   Company background/history
  - o   Quick overview of services and capabilities
  - o   Management or key personnel bios
  - o   Contact information
- Vendor's proposed solution
- Basic summary of the solution
- Solution methodology/process
  - o   Development plan
  - o   List of tasks
  - o   Timeline
- Details on proposed solution
  - o   Original ideas – strategy, creative, etc.
  - o   Features and functionality
  - o   Options and add-ons
  - o   Scalability
  - o   Technical requirements
- Preliminary design compositions (voluntary)
- Proposed budget
  - o   Cost of services
  - o   Required 3rd party costs
  - o   Support and maintenance
- List of deliverables
- Ownership
- Proposed Project Team
- Vendor references
  - o   Show examples of previous work
  - o   Provide client references
  - o   List awards/accolades and special certifications

HOW TO WRITE A GREAT REQUEST FOR PROPOSAL

INFORMATION TO PROVIDE VENDORS IN RFP

Providing vendors with the right information up front will save you and everyone involved a lot of time and discussion. The better educated vendors are on your company and initiatives, the higher the quality of response and more accurate proposals you'll receive back. If your project deals with sensitive company information, you should consider requiring each participating vendor to sign a non-disclosure agreement prior to receiving the full RFP and associated information.

QUICK FACTS ABOUT YOUR RFP
To begin, a short bulleted list of important points not to be missed is often a good idea, especially if your RFP is particularly long or complicated. Information such as the type of project, level of confidentiality, response deadline would likely be highlighted here.

BACKGROUND ON YOUR ORGANIZATION
Provide some brief information to introduce your company. A simple "elevator pitch" or the boiler plate "About xyz company" commonly used on your press releases should do nicely. Consider including any additional information relevant to this initiative that may not be publicly available otherwise. You may want to include information on recent events or initiatives that have taken place that affect or are driving the company and its future plans from a high level.

YOUR CONTACT INFORMATION
If possible, designate one point of contact for vendors to email or call with questions. Expect that they will call to establish an initial rapport with you. Having an open channel of communication is important, but can easily get out of hand or skew the playing field if not managed. Keep in mind that inadvertently providing different information to each could taint your ability to make a fair comparison, ultimately doing yourself a disservice. Give some thought on how to structure your communications so they don't conflict with your decision criteria.

SCHEDULE FOR THE PROPOSAL PROCESS
Provide a clear schedule of events and deadlines for the entire process. Give vendors (and yourself) plenty of time to perform the work necessary to properly provide what you are asking. Be realistic and considerate. Your project may not be the only one in the pipeline. If you are unsure of how much time to give, simply call and ask one or two vendors for their advice on the time they need between milestones. Don't forget deadlines you must set for your own tasks in response. Depending on the size and complication of the project and how

many people must be involved, a typical process can take from 2-3 weeks to 2-3 months (we'll go over this in detail later on in the guide). Also, don't forget to cross check your schedule against holidays that commonly affect work schedules as well as any other special events within your company or even industry events that would cause conflicts.

An Example RFP Schedule:

- March 1: RFP Announced/Sent
- March 4: Deadline to RSVP participation
- March 8 – 11: Conference calls with vendors to discuss RFP
- March 22: Deadline for vendors to submit proposals
- March 28: Selection of finalists
- April 5-7: Vendor finalist presentations
- April 11: Final vendor selected
- April 25: Targeted project start date

CRITERIA FOR MAKING YOUR DECISION

Define and communicate what is most important to you and your team in making a decision. This will ensure that each vendor will provide you with the relevant information you need to make a side by side comparison. Plus, this will help to keep each member of a decision committee (if you have one) on the same page.

BASIC SUMMARY OF THE PROJECT/INITIATIVE

In a basic paragraph or two, sum up the overall project and the most important points, including overarching goals, drivers, key performance indicators and timelines.

PROJECT'S TARGET MARKET/USERS

Whether the engagement is about developing a digital strategy plan, email marketing campaign, corporate website, search advertising, interactive CD-ROM, e-commerce or even back end systems, there are almost always primary users, targeted users or just people who have a stake in the project. More than likely, this is who the project serves and thus, it's important for the developer/marketer to know who they are targeting. Depending on the nature of your project, the type of data will obviously vary, but may tend to look like the following:

- Types of users (e.g. consumers/customers, your employees, business partners)
- Audience targeting/profiling: demographic, geographic, behavior/psychographic
- Size of the overall audience/user base (current and projected)
- Other user characteristics – associated web/technology, usage times, etc.

DETAILED OVERVIEW OF THE PROJECT

The more insight and relevant information you provide about the specific nature and details

of your project, the better equipped the vendors will be to respond intelligently with ideas and solutions that are properly aligned with your business and goals.

Which type of details do you provide? This will critically depend on whether or not this RFP is focused on a tactical project/program or is on a higher level that centers on a need for strategy development which in turn drives one or several other initiatives. Think about this seriously: Do you have all the "big ideas" and overarching strategy in place and you are just looking for help on the tactical implementation? Or are you looking for creative ideas and "out of your box" thinking to ultimately define and map ways to achieve your business goals?

Vendors are usually in a position to provide additional perspective and fresh new ideas that you may not have thought of from where you are sitting.

Whether or not you classify yourself as a hardcore digital strategist with all the answers, I recommend you deliberately focus on communicating details about your business goals and requirements. Seek to get more than just recommended tactics and detailed specifications from the experts to whom you are seeking proposed solutions from. They are usually in a position to provide additional perspective and fresh new ideas that you may not have thought of from where you are sitting. I've seen a number of RFPs written to such detailed specifications that there was no room left for new ideas and suggestions from vendors. Maybe you don't need a sledgehammer to kill a fly and it takes an outside point of view to recommend a better approach. Be sure to leave some room for strategic suggestions, and if possible room for creative "big ideas" on overarching strategy for the business. Below are the items to include in your project overview:

- **Primary goal –** What is the ultimate business goal for this project? What is the one main thing you are trying to achieve?

- **Secondary goals –** What are the supporting goals and secondary benefits you expect to achieve/gain?

- **Budget –** Yes, a budget. At least a ball park budget range. This will quickly allow you and your vendors to determine if you are on the same page and whether or not you are a good match for each other. Don't worry about not getting a realistic quote just because you've stated a budget. The fact that this is a known competition for your business will ensure that vendors will try to win your business by giving you the most bang for your buck. It's easy enough to weed out the inflated bids from those offering real value.

  - o **Budget Drivers –** In some cases, it may be necessary or at least helpful to outline how your budget is calculated and driven. For example, some programs may have an ongoing budget that is directly tied to revenue

generated or specific milestones (such as achieving a critical mass of targeted users).

- **General Scope –** Give your vendors some boundaries on what to scope out for you, but be flexible so that you are allowing input for new and innovative ideas that could help your project. Differentiate the "need to haves" from the "nice to haves".

- **Time Frame –** Do you have a deadline for delivery or launch for your project? Are there some other time driven milestones you must meet?

- **Business Requirements –** What kind of business rules must be observed for the project? Are there some specific legal issues that must be observed?

- **Creative/Design Requirements –** Are there specific design requirements that must be taken into consideration? Logo and brand guidelines? Specific ad creative parameters? How should a site or application look and feel? Do you have examples you can point to of what you like and dislike?

- **Functional Requirements –** What sort of functionality do you see as being necessary to achieve the business goals of the project? Social media integration for content sharing, content management, e-commerce, data gathering forms, special applications, etc.

- **Content/Content Development Needs –** Do you have an overall content strategy in place or do you need assistance in creating a content development plan for your initiative? Where will the content such as text copy and imagery come from? Does it already exist or will it need to be developed. Are you expecting the vendor to do this or will you provide all the content, web ready? Will there be rich content, such as Flash animations, streaming audio or video?

- **Existing Technical Environment/Requirements –** Does your organization have a technology platform preference? Are there specific hardware/software that must be used or integrated with (e.g. specialized hosted tools/platforms, server software, operating systems, application servers, databases, existing hosting environments, etc.)?

- **Your Preferred Working Relationship Requirements –** What do you envision as your optimal working relationship with a vendor? Do you care if the vendor out sources or subcontracts part of your project or do you prefer a firm that has all the capabilities and resources in-house? Do you have other departments, agencies or

3rd parties that will be involved that the vendor must work with directly or just through you?

- **Ongoing Support and Maintenance Requirements –** What kind of support do you envision you'll need? If you are unsure, give a description of your current resources and ask that the vendor provide suggestions on your ongoing needs.

INFORMATION TO REQUEST FROM VENDORS IN AN RFP

For everyone's sake, have a goal of keeping things clear and concise. Be careful about asking for too much of a proposal for your size of a project. Know what really matters to you and ask only the questions that will get you that information. Coming up with the ideas and recommendations for the appropriate custom solution and then providing a detailed proposal can be an immense amount of work for which the vendor has no guarantee of compensation. Again, **be aware that any original ideas and creative work provided to you in a proposal does not belong to you until you pay for it.** Don't be surprised if some vendors will require you to sign a non-disclosure or similar agreement in order to protect their proprietary assets and intellectual capital.

Know what really matters to you and ask only the questions that will get you that information.

VENDOR COMPANY INFORMATION

Ask for all the general information about the vendor to give you a good understanding of who they are, what types of services they offer, the type of talent and resources they have access to as well as their stability and bandwidth to handle your project within the necessary time frame you are requiring. Be wary of those vendors who list a huge line-up of services, yet only have the real experience and existing capability to deliver on only a portion of them. If parts of your project will be subcontracted to other sources, ask for this information up front so you are left with no surprises.

- Company background/history
- Company size (note that bigger is not always better)
- What percentage of their overall business is interactive marketing/web development (or whatever is specific to your project)?
- Quick overview of services and capabilities
- Key resources applicable to the project described in this RFP
- Management or key personnel bios
- Contact information

VENDOR'S PROPOSED SOLUTION (AND/OR RELATIONSHIP)

Here is the meat of what you've requested: the solution (or relationship/partnership architecture). You didn't ask for just a company resume (that would be an RFI – Request for Information). This is about your initiative and the proposal should focus on the solution, whether it's an actual project, product or a defined partnership. It is here where you will determine the level of understanding the vendor has for your initiative and their ability to help you make it a success.

- **Basic summary of proposed solution –** This should be clear reflection of what you are looking for and express an understanding of your initiative from the vendor's perspective.

- **Solution methodology/process –** What is the vendor's manner and approach to determine and build the solution and/or ongoing relationship?
  - **Partnership plan –** What is the overall framework of the proposed relationship? What resources of yours will this draw upon?
  - **Development plan –** How does the vendor plan to perform the work necessary to build the solution?
  - **List of tasks –** What are the expected tasks to be performed? You will paying the vendor to perform work. Make sure they list the tasks, as those can be considered part of the expected deliverables.
  - **Timeline –** Does their timeline reflect your own and allow you to meet your goals? Is there some room for contingencies?

- **Details on proposed solution –** This should be clear on how it meets your business requirements and achieves your set goals. If you're RFP is centering on the level of strategy development, then scale up the following items to focus on how top line strategy will create and drive tactical programs overall.
  - **Strategy, original ideas –** direction, creative, etc. – Look for specific thinking that demonstrates an ability to creatively develop ideas and strategy to solve problems and help you achieve your goals. Does the vendor have some great "big ideas" that really add value to your project and amplify your results? Does the creative design work "WOW" you and make you feel excited about what you'll get for your project?
  - **Features and functionality –** Are you getting what you need to meet your business requirements? Is it the minimum necessary to meet your needs or is the vendor really striving to give you some great added value?
  - **Options and add-ons –** These might be considered the "nice to haves" that are outside your scope or budget, but significant enough that the vendor feels it's important for you to be aware of. You may decide it's worth it to

add them to your initiative, either immediately or perhaps during a later enhancement phase (or "phase 2") as your project grows.

- o **Scalability –** It's extremely important that you have a solution that will handle the scale of operation or business which may occur during its expected life cycle. Make sure the vendor provides you with information and assurance that this will scale to meet your reasonable needs (at least until you get to a positive ROI before having to invest more to re-build).
- o **Technical requirements –** Does the solution the vendor is proposing have any special or notable technical requirements for which you will have to make significant accommodations. For example, unplanned implementation of new technology that you and your team will have to learn and maintain.

- **Preliminary design compositions –** If your project is big enough to warrant the work, some vendors may volunteer some preliminary design compositions to illustrate their ideas and demonstrate their talent as it would apply to your initiative. This is a nice to have and really shouldn't be expected of vendors unless there is just no other way for you to visualize their ideas or sufficiently judge the quality of their work from the vendor's past projects. If you are demanding comps, you better have a big carrot. Also, know that anything presented is based on limited information and usually isn't set in stone.

- **Proposed budget –** A proposed budget is often the best guess estimate for the cost of your project. Why is it a best guess? Because almost assuredly, during the project things will come up which affect the scope and therefore, the budget. Once the project begins and the client and the vendor dig deeper, unforeseen problems occur, new aspects emerge, as well as new ideas for strategic direction, features and functionality naturally develop. Perhaps a significant market or business development occurs that will affectively require changes to the scope. More often than not, "scope creep" is a result of the client changing their mind on items or wanting to implement new ideas during the project. However, to avoid costly misunderstandings be very clear about getting full disclosure of all related costs.
  - o **Cost of services –** How are the costs broken down? Is it time and materials or is this a flat fee based project? What will be the terms? What is billed as extra? (i.e. travel and expenses). At what rate will you be billed for add-on work?
  - o **Required hard/3rd party costs –** What is included in the estimated services budget and what is "extra". For example, does the proposed solution/relationship that require the use of 3rd party software/services or special components?

- **Support and maintenance –** If applicable, how will the vendor warranty its work to you? What is considered under warranty and what is considered additional work you must pay for? Do they offer a service or maintenance agreement that fits your projected needs?

- **List of deliverables –** Get a concise list of deliverables and tasks that will be performed. Know exactly what you are paying for and what you are going to get.

- **Ownership –** Ask for a clear explanation of what you will own and what you won't. Who owns what content and creative? For developed web apps, will you own all the rights to the source code or do you just have a limited license? Will vendor retain some rights to any new code developed during your project? Is there the potential for the vendor to sell or license an application to your competitors, which to you paid to have developed?

- **Proposed Project Team –** In some cases, you may want to ask for bios on specifically the team that will be working on your project. Many times, vendors will not be able to guarantee a specific team or resources until a contract is signed. If this is the case, then ask for some details on the expected level of experience and different roles that will make up your team.

- **Vendor references –** Ask for several references (I'd recommend at least 3 major references) for you to call upon. These can be entities which are the vendor's clients and/or technology partners.
  - Show examples of previous work (preferably related)
  - Provide client/partner references
  - List awards/accolades and special certifications

HOW TO MANAGE THE VENDOR SELECTION PROCESS

Having a great request for proposal is only part of the overall process to help you find the right vendor partner to make your initiative a success. Once you've completed your RFP, it's time to implement the vendor review process. There is some additional prep work that needs to be done, prior to sending out the RFP. Having a good plan and schedule in place will make the process far easier for everyone.

THE GENERAL COMPONENTS OF THE VENDOR SELECTION PROCESS:

- Create Selection Committee & Decision Criteria
- Finalize Schedule of Events
- Completion of an RFP
- Create Initial Target List of Vendors
- Initial RFP Announcement/Send
- Submission Deadline
- 1ST round Proposal Review
- Narrow Down to Finalists
- Vendor Finalists Review
- Selection of Vendor
- Final Contract Negotiation

Selection Committee

First of all, is a selection committee necessary? Based on your type of project or initiative, you may be the only decision maker necessary and therefore you can skip the whole ordeal of creating and managing a committee. In many cases, however, the initiative at hand will need

Don't discount the existence of some great input and expertise of other people in your organization who may have relevant experience.

sign off from several decision makers and the expertise/input of several people within your organization to make the best possible selection. Who in your company will participate in the process to find a vendor? Commonly, the decision is up to those people to whom the project directly affects. Selection committees usually range from 2 to 10 people. Additionally, don't discount the existence of some great input and expertise of other people in your organization who may have relevant experience from similar projects in another department or from a previous job. Leverage the talent you have available to you in your organization, even if it's only on an advisory level.

However, try to keep your group to a small size so as not to paralyze the decision making process.

PRE-DEFINE DECISION CRITERIA

Define what is important to you up front. In this guide, I've provided some recommended criteria to evaluate, but this is ultimately up to you. You'll need to provide some documented guidance of your own, outlining the decision criteria to your committee. This will ensure that everyone involved in making the final decision is evaluating the vendors based on the same criteria.

SCORING SYSTEM

Many organizations utilize a scoring system whereby they weight each decision criteria based on what will be the most important. Although the scoring will be based on the opinions of each member of the decision committee, this will help reduce some subjectivity when evaluating the vendors. However, the scoring should only be used as a guide. If you have a strong feeling about someone, and they score well, you should choose them.

Example:

Criteria	Total Possible	Score
Creative Abilities	50	40
Understanding of Project	35	30
Experience	15	10
Total:	100	80

Finalize a schedule

Determine the schedule and necessary participation of vendors and your selection committee for the process. There are several key important factors to take into consideration here when trying to devise a workable schedule. Optimally, you'll want as much time as possible to make it comfortable for both the vendor to develop their proposals and for you and your committee to properly review proposals and interview the vendors. Consider the following when creating your schedule:

YOUR PROJECT TIMELINE

Do you have some specific timeline goals that you must try to adhere to? For example, does the project have a hard start and completion date? What are the drivers for this? If these kind of calendar based milestones are driving your project, be sure to map to map your schedule to this in order to determine how much time is available to you and what your room for flexibility is.

AVAILABILITY OF COMMITTEE MEMBERS

For all those on your team that are involved, what will be their availability during the proposed timeline to properly review each proposal, attend the necessary review meetings and vendor interviews? It is essential that you pass the proposed schedule by the committee members and get their buy in and commitment for attendance and deadlines.

TIME NECESSARY FOR VENDORS

Last, but not least, you should have a ballpark idea of how much time should be given to vendors to respond to your RFP to properly prepare proposals, presentations, etc. This will vary considerably based on the scope and complexity of your project. If you don't have a good idea, simply ask. Refer to a colleague with previous experience or just call one or two potential vendors to allow them to give you an idea of what they need in order provide you with accurate and relevant responses (defer any of their detailed questions about the project to the coming RFP – it's their job to find out as much as possible, of course). **See example schedule below for more details.**

Completion of an RFP

Write your RFP per my guidelines in this guide, of course. Having one or two of your committee members proof your RFP might prove helpful, however you should take care to avoid falling into a scenario where you end up writing the whole thing by committee – you'll likely never get it done that way.

Initial target pool of vendors

Determine a list of vendors who will get the RFP and gather the necessary contact information. Do a little homework to identify a pool of vendors that reflects the potential number of calls and proposals you feel you can effectively review and handle. Remember that the more vendors you request proposals from, means more people, calls, meetings and proposals you are signing up to manage and review.

I recommend you find a mix of large and small firms as well as local firms and firms located outside your geographic area. Remember that distance from you is not a measure of talent. These days, geographic location is less and less of an issue for most, so why not give yourself more flexibility when creating your pool of possible talent?

EXAMPLE SCHEDULE

Again, depending on the size and complication of the project and how many people must be involved, a typical process can take from 2-3 weeks to 2-3 months.

MARCH 1: RFP ANNOUNCED/SENT

These days, email is sufficient. Send to your targeted list of vendors. I suggest you loosely make this invitation only. The last thing you want to deal with is a bunch of unqualified vendors and unsolicited proposals impacting your workload. Although, do stay open to adding vendors to your list should you come across a well-qualified vendor that is worthy.

MARCH 4: DEADLINE TO RSVP PARTICIPATION

Use this to get an idea of who will be responding to you to determine your workload. You can also use this date as your response to latecomers who are unqualified.

MARCH 8 – 12: CONFERENCE CALLS WITH VENDORS TO DISCUSS PROJECT

It is to your advantage and benefit to have a call with each prospective vendor. Use these calls as an opportunity to help your prospective vendors obtain a vital understanding of your business and your proposed project. It will help them provide accurate and relevant responses to your RFP. Additionally, it will give you a little foresight on what to expect from them.

> **Alternative:** An alternative to having individual conference calls is to require all vendors to submit questions in writing by a certain deadline date. Then post or send back written responses to all questions in one document to all vendors. You may even have a Q&A conference involving all vendors. In my experience, this is far less effective than having individual conference calls where people have the environment to focus on you and your project rather than focusing what competitor is listening on the phone and who is asking what questions. Remember the idea is to provide an environment that will produce the best work and ideas for your project – even as early as when your vendors are developing their proposal ideas.

MARCH 22: DEADLINE FOR VENDOR PROPOSALS

In this example, we've given vendors roughly 3 weeks since the date of announcement and about 10 days from the date of their conference call to develop their proposals. This is fairly typical.

> **1ST round proposal review –** Here it is up to you and your committee to review the proposals and judge based upon your agreed evaluation/scoring criteria. You may decide to narrow the proposals down to a short list where you have some additional questions directed at vendors in order to narrow them down to just a few finalists.

MARCH 26: SELECTION OF FINALISTS

It is fairly typical to narrow your selection down to 3 finalists. In general, you should feel comfortable that any of these finalists can do a satisfactory job if awarded the project. Moving forward, the challenge is to choose which will work best with your company and provide the greatest results. Be sure to provide an announcement that you've narrow down to of the finalists to all those who participated (so no one is left hanging). It is up to you whether or not you announce who are the finalists. If your project deals with sensitive or security items, it would make sense not to make public those that might be given access. Otherwise, I don't see any reason to be secretive.

APRIL 5-7: VENDOR FINALIST PRESENTATIONS

Give the vendors an opportunity to meet with you (face to face or via phone conference) to present and discuss all they have proposed. Allow time for the vendor to present and then have an allotted slot of time for questions and answers. Make sure your committee members come prepared with some of their initial thoughts and questions written down prior to the meeting (so as not to forget or become sidetracked during the meeting presentations). On average, these meetings will last about an hour or two each. Longer, depending upon the scope and complexity of the project. More important than the length of the meeting is that you get your questions answered and a full understanding of what the vendor has to offer you.

APRIL 9: FINAL VENDOR SELECTED

Again, you should feel comfortable that any of finalists can do a satisfactory job if awarded the project. Rank them in the order you feel the vendor can work best with your team and help you reach and surpass your goals. Important: Keep in mind, that you'll need to fall back on one of the other two vendors if your first choice doesn't work out.

> **Final Contract Negotiation –** This will vary considerably, so I won't really discuss it here. How you set up terms and deliverables are subject to how each company has developed their own policies. Typically, vendors may require an initial retainer to begin work and then bill out based on hours worked or milestones met. Make sure your contract clearly states what you are paying for, when you will get it and how it will be delivered/implemented. I recommend you are extremely careful about making sure you get all documentation, licensing and source code. Know the difference between what you own and what you have a license for.

APRIL 20: TARGETED PROJECT START DATE

Hopefully, this has provided some help and insight into what is a good process for writing and RFP and selecting a vendor for a successful project. Now your next item of business is managing the project and all those involved.

ABOUT THE AUTHOR

TONY KINARD

The voices in my head may not be real, but they have some great ideas!

For 16+ years I've smiled more than anyone I know. I've had the honor of working with brilliant ad agencies, digital marketing innovators and technology vanguards. It's been amazingly fun and exciting work helping clients to successfully leverage tech innovations and new ideas. From scrappy startups to some of the best known brands in the world, I love the challenges they present.

Admittedly, I obsess over technology innovations, creative ideas, brilliant people and understanding human nature - they are my best source of inspired thinking to overcome complexity.

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Web Development

Social Media Marketing

Email Marketing

Search Engine Marketing