

The RFP: Make It a Win-Win

How you can get the most out of a necessary evil

by JANE PELLICCIOTTO

The RFP (Request for Proposal) signals opportunity for a creative firm! They've made it onto your list of qualified firms. You'll have multiple options from which to choose, pouring over creative work samples and pricing ranges. On the surface this sounds like a win-win for both parties. Not really.

*For every creative firm who sees opportunity, another sees a cost to avoid.
For every client who sees opportunity, another sees it as an onerous task that takes them off their real work, and is confused about the process.*

If the process seems to favor you, it's because you create the RFP, choose who bids and choose who gets the job. But there are **real costs** that are not obvious up front. Even the best-run RFP process has built-in flaws. You can get the most out of the process if you recognize these flaws and costs, and then use workarounds.

Built-in Flaws

By nature, the typical RFP process eliminates the most positive, fruitful, collaborative elements from the process of developing effective identity and marketing communications. Here's why:

You and the creative firm rarely get to meet in person or talk on the phone. Familiarity smooths the path to working together, which is absent from most RFP processes. You and the winning bidder are now stuck with one another. If there isn't a good connection, the work can suffer and the process can be frustrating for both sides. Misunderstandings happen even in the best relationships, but the parties involved can more easily work around them.

Too little scope vs. too much — a Catch-22. For you to compare apples-to-apples proposals effectively — costs, approaches, work samples and experience — the scope of the work has to be so specific as to leave no wiggle room for better deliverables than what you asked for. Ideally, the RFP says *who you are, who you need to speak to, and what you hope to achieve*. A creative firm could then propose the best ways to deliver the message (which might be different than what you asked for). It's a bit of a chicken and egg problem. A sole source provider can explore different approaches if they aren't hamstrung by a cookie cutter proposal. But when multiple firms are bidding, cost estimates have to reflect an already-defined scope, and that already-defined scope limits possible outcomes.

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No framework for discussing proposals. A good proposal, it could be argued, should speak for itself, but a proposal is really a *suggestion*. There are many ways to skin a cat, and most projects have nuances that benefit from discussion.

The disembodied proposal doesn't serve you well.

You should want to discuss approaches, scope, costs and timeframe with the creative firm. Most firms would welcome the opportunity to clarify the proposal and suggest new approaches. A well-written, compelling proposal is an art and a science, much like design. But most RFPs lack the kind of information that make good proposal writing easy.

Little repeat work. Organizations that most often use RFPs are bound by procurement rules that don't allow for repeat work with the same firm. Good creative firms know that the best work comes from a longer-term relationship where repeated exposure allows for refining, improving, pre-planning.

Costs, and How to Avoid Them

When we think of costs, we think of dollars. This makes sense. Dollars are easy to count. But the non-monetary costs are often more insidious because not counting them can lead to bad decisions. Here are a few of the not-so-obvious costs:

Your staff time. The proposal process can eat up your time better spent on activities like clarifying messages, determining audience needs and setting goals. This is a true cost to an organization. I was once one of 17 proposers on an RFP that required multiple emails to clarify a loosely defined brief. Four firms were interviewed after multiple staff members read all proposals and then attended the interviews. It was likely a full-time job for the marketing director for weeks, and the real work had yet begun.

Two things you can do:

1. Select five or six firms with similar levels of talent and experience. Meet each one in person for half an hour. From that handful, select three to present proposals (one, if the process allows). Now you start the process with more knowledge of and confidence in the proposers. The proposers will be more invested and enthusiastic. You have fewer proposals to plow through. Win-win!

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2. Create a good RFP that covers the essentials (goals, hoped-for results, budget, resources available, whether background marketing research is available, timeframe, etc.). The better it is, the less time you will spend fielding questions and deciphering proposals. You review three targeted proposals, not 10 or 20. The project starts sooner, allowing more time for the right creative solutions to emerge. You should encourage your procurement departments to eliminate burdensome legalese not fitting to the type of work being done. A marketing firm is different than a company that hauls hazardous waste. The RFP's contractual language should reflect that.

Effectiveness. RFPs often emphasize the *what* (brochure, website, poster), and not the purpose and what you're trying to achieve. This can lead to less effective work. Lack of effectiveness isn't easy to measure through. And measurement, if it happens at all, happens at the end. An RFP that de-emphasizes goals, results and message is usually one that emphasizes money (rather than value), and the ability for a creative firm to hit an often arbitrary, often rushed deadline. Instead, look for a blend of elements — resulting in value.

It's often better not to do a project than to rush one with an unfocused message sent to too wide an audience. But being effective requires taking a leap of faith that best practices really do work. Use them to your advantage.

Loss of goodwill. Some firms might suspect that you are fishing for prices. This may not be the case with you but it does happen. Creative firms are especially suspicious of RFPs that don't disclose a budget. Budget is used, not to bid up to, but rather to assess whether the project is a good fit. Have confidence that you will be able to assess cost, talent and experience when you have the proposals in front of you.

Some RFPs blur the line between pro bono versus paid work or are 35 pages long and laden with liability. Still others leave little time to write an effective proposal. The result is a collective dismissing of RFPs by otherwise good creative firms. Just the firm you need!

You have limited resources and time. You want your organization to be as effective as it can be. You might be bound by an RFP process, but that process doesn't have to cripple your organization. Done well, you can make it a win-win for everyone involved.

