



Win the RFP Before You Hit Submit



RFP Responses often lead to a last-minute flurry of activity and a disappointing final product. But advance preparation – sometimes long before the RFP arrives – can simplify the process and give you a big advantage over your competitors.

Remember, preparation is the only thing over which you have total control. Use your time wisely. And keep everyone focused on answering the question, “What Will It Take to Win?”



At the Starting Line: Begin With the End in Mind. Make Sure the Team Discusses These Goals

Demonstrate your commitment to the customer’s success.

Recognize that the scope will change, and you may need to decide whether you can be flexible without giving the shop away.

Explain why solving the problem is so difficult

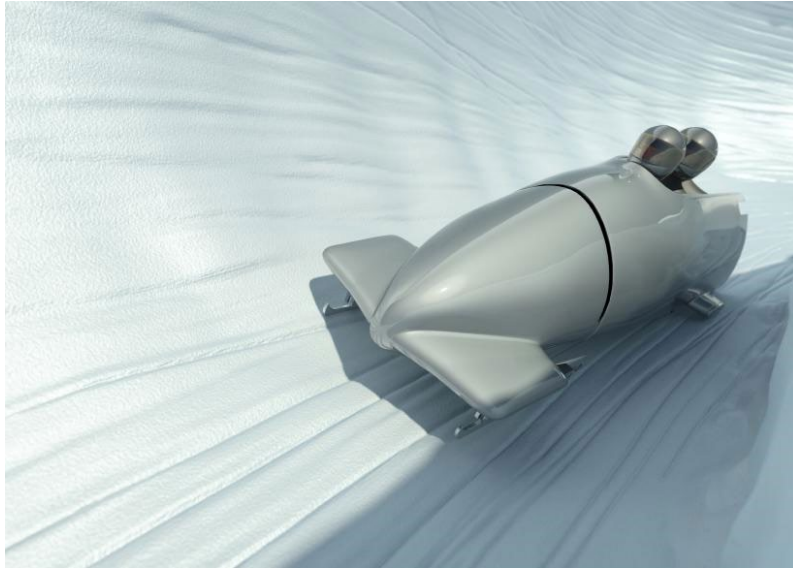
- Highlight how your approach uniquely overcomes the hurdles.
- Emphasize difficulties you know your competitor cannot address.

How do you make this about value rather than the lowest price?

Discuss critical elements of your solution and obtain necessary agreements BEFORE you develop your proposal.

Have you used LinkedIn or other networks to learn about the key players?

GUIDING PRINCIPLES



Return to these throughout the research, writing, and approval process to keep things from going off the rails.

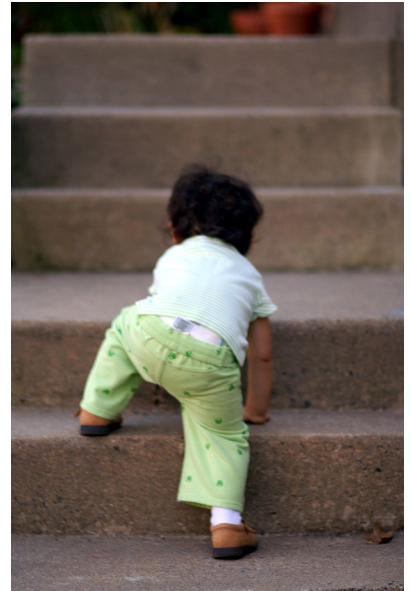
- **NEEDS IDENTIFICATION:** Is our response value-based and does it demonstrate we understand their current situation, primary issues, pains, and needs?
- **GOALS IDENTIFICATION:** Does our response convey our understanding of their goals and how achieving them will positively impact their business? Why is the client issuing the RFP? What is their primary need? What is their unspoken need?
- **SOLUTION RECOMMENDATION:** How does the proposed solution complement their needs and how will it help achieve their desired goals and results? Are we adding additional value beyond the RFP's scope? Is the client open to additional value? Do we address all requirements? If not, are we teaming up with someone else?
- **VISION CREATION:** Does our solution align with their goals and help them understand why we're the right choice?

These are mostly qualitative measures. Think about how you can put a quantitative lens on them. Too many companies spend way more time talking about "how great we are" and not enough on "how we'll add value to you."

FIRST STEPS

☐ Consolidate your deadlines in one place

- This includes due dates, primary contacts, your project manager, internal decision-makers, ground rules, whether questions (and answers) will be shared with all participants, and formatting guidelines.
- Build a timeline and get buy-in from everyone involved: Think about submitting a few days early and working back from that, taking into account your approval processes, vacations, and decision-makers who will either have lots of feedback or be slow to respond.



☐ What are they looking for?

- List the specific instructions, then simplify
- List specific evaluation criteria, then simplify
- Outline each section's specific value (present tense, active verbs)

☐ Assess the situation before you look at the questions:

- What problem are they trying to solve (including revenue, customer experience, compliance, and products)?
- How will we differentiate ourselves?
- Is there an incumbent?
- Why are they issuing an RFP?
- Is there any reason we DON'T want to participate?
- What do we know about the people involved (decision makers, our champions and enemies, and our competitors' champions and enemies)?
- What information do we need to respond effectively?

RAISE THE DRAGON SLAY THE DRAGON



Ask the probing questions that will help you identify the challenges you're facing so you can address them.

About the Customer

- Do we have an existing relationship with them? If so, what's gone well and what hasn't?
- How do they feel about us? How do we know that for sure?
- Who are their other business partners? Do we do business with any of them?
- Would they be willing to meet with us to discuss the RFP?
- Is this a legitimate opportunity? Are they "price-shopping" or will they let us do a lot of work and then hand it to the incumbent?
- Will they be asking for the minimum price with lots of technical requirements?
- Are there specific terms/phrases that we should use or avoid?

For the Customer

- Can you describe the process going forward?
- What issues have you had with your current provider?
- What's the single biggest issue facing your company today?
- Tell me which features/services are important to you (keep asking)? List them out and then ask, "which one is most important to you?" Then ask why it's most important.
- Is there a scenario under which you'd choose multiple winners?
- What questions haven't I asked that would help me develop the best proposal for you?
- Do you or anyone else have concerns about switching partners?

WHO ARE THE KEY PLAYERS?

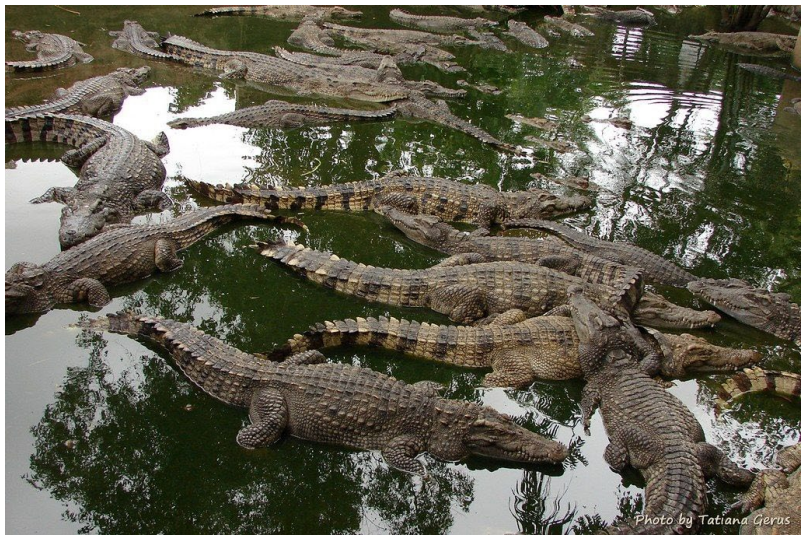
PERSON	TITLE	FRIEND OR FOE?	RFP ROLE?	HOW DO WE INFLUENCE THIS PERSON? WHAT IS OUR GOAL?

Roles include Decision Maker, Influencer, Champion, Gatekeeper, Enemy, Consultant, Evaluator. A person can have more than one role. Include as many people as you need.

BUILDING YOUR RESPONSE

- Problem Solving:** Identify the problems they are trying to solve (and how important each one is to them) and your proposed solutions.
- Hot Buttons:** List each one and how you will address that issue. An example might include data and privacy or specific terminology.
- Key Selling Points/Value Proposition:** List the key features of your product or service, the benefit of each to the client or prospect, and define how you'll document that.
- Why Is This Difficult?** List any challenges and how you will address/ overcome them? Answer specifically, "What are you going to do for me?" What is the story you must tell to answer that question?
- Proof Points:** What will we claim we've done? Document where we did it and the benefit to the customer.

RISKS



What if the prospect doesn't like some part of your proposal? What might threaten your implementation timelines? Is the technology in place TODAY to get this done? Is there anything external that could impact your proposal (timeline, economy, change in partner priorities)?

SOME CONSIDERATIONS

- Precedents:** How did you resolve issues with other customers that might apply here?
- Value-Added Innovations:** Be prepared to talk about specific innovations that address customer goals or challenges.
- Investments:** Outline investments you've made (or will make) to make this program a success (technology, processes, or staffing).
- Metrics:** How will you demonstrate the value of the program? Will they be immediately actionable? How will they make your primary contacts look good to THEIR management?
- Anticipated Competition:** What are their strengths, their weaknesses, their expected technical approach, and how can we improve our position against them?.

BRINGING HOME THE WIN!

Many a proposal has been lost from lack of attention to detail. Before you hit submit, here are some tips:



During the Drafting Process

- Lead with Benefits to Customer, not solution features. We improve X by Y. We do this by Z.
- Answer “What are you going to do for me” with specifics.
- Present tense, active voice. Do not use “will.” Search the document.
- Lots of graphics and call-out boxes. Show diversity.
- Avoid captions. Get to the punchline. Make it relevant. Capture the reader within the story.
- Avoid deadly words that can lead to legal or relationship issues (e.g., all, every, ensure, assure, guarantee, always, promise, commit to).
- Try to stick to one writer. Writing by committee rarely works out.

Review the Final Document

- Did we demonstrate a clear understanding of their problems?
- Did we show an understanding of the difficulties?
- Did we show how we’ll get over significant hurdles?
- Do we explain how the solution meets the requirements?
- Have we demonstrated a commitment to the customer’s success?
- Did we use formatting to facilitate understanding?
- Did we carefully proofread the document?



Yes, there's a lot here. But there's a great deal to consider if you want to win a highly-competitive RFP and this is just one thing on your already crowded plate.

Herding the cats takes time. Friction Free Communications can help you create RFP response templates if you're in a big organization; individual responses for critical deals regardless of your size; or help you create a preparation strategy for your next renewal with an important client, starting with a relationship planner.



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