



Successful RFP Responses



Introduction and Overview

- What you *can* expect from this session
- What you *do* expect from this session



Workshop Objectives

- To identify the key success factors in developing successful RFP responses and winning new business
- To provide a checklist of issues and concerns that should be addressed for any RFP response
- To share experiences and insight



Agenda

- Anatomy of an RFP
- To Bid or Not to Bid
- The Budget
- The Schedule
- The Teams
- The Strategy
- The Proposal Document
- The Oral Presentation
- Debriefings



Anatomy of an RFP



Definitions

- Bidder, Respondent, Vendor, Supplier or Proponent
 - ⇒ The entity that is responding to the requirement
- Requirements
 - ⇒ Commitments you agree to by submitting a proposal
- Mandatory Evaluation Criteria (P/F)
 - ⇒ If you fail then your bid is no longer considered
- Rated or Non Mandatory Evaluation Criteria
 - ⇒ You can achieve a low score and continue on being evaluated
- Weighting or weight
 - ⇒ A global weight out of 100 that is given to a rated or non mandatory item



What Makes a Good RFP?

- Well organized
- Deliverables well defined
- Evaluation process and criteria are clear

- If not...
 - ⇒ Get the information other ways
 - ⇒ Don't guess



Major Components of an RFP

- Typical Table of Contents
- Background
 - ⇒ Usually provided as information in order that you can familiarize yourself with the requirement
 - ⇒ No formal responses required
- Terms and Conditions
 - ⇒ Terms and conditions you will be held to
 - ⇒ Usually standard
 - ⇒ Look for penalty clauses and understand their ramifications



..Major Components of an RFP

- Requirements and deliverables (Statement of Work)
 - ⇒ Major portion of the RFP
 - ⇒ Clients requirements, deliverables and timeframes are stated
 - ⇒ Make sure you understand what is being asked for
 - Ask questions if any item is not clear
- Selection process and evaluation criteria
 - ⇒ Sequence of events and decision points
 - ⇒ Mandatory vs rated criteria
 - ⇒ Weightings



..Major Components of an RFP

- Response requirements
 - ⇒ Here is where you are going to write the response
 - ⇒ This is what will be evaluated
 - ⇒ More later...



..Major Components of an RFP

- Bidding Instructions

- ⇒ Will state how to respond

- Response format
 - Checklists and forms to be completed

- ⇒ If no format provided follow the RFP format and numbering

- ⇒ Additional information

- Appendices, Statistics
 - Document libraries, a study, website
 - Separate statement of work (SOW)



To bid or not to bid

- Can you deliver/meet the requirements?
- Can you meet the mandatory criteria?
- How will you score on the rated criteria?
- Will you be price-competitive?
- Is the process fair and open?
- Can you afford to bid (to win)?
- Are the \$\$ and effort worth it?



..To bid or not to bid

- Evaluation Criteria

- ⇒ Mandatory Criteria

- The result of a mandatory (P/F) evaluation criterion is to fail the respondent if they do not comply with this requirement
 - Ensure mandatory evaluation criteria (P/F) are addressed with substantiating documentation or text that establishes compliance

- ⇒ Certifications

- Ensure copies of certification are enclosed, signed where appropriate and a reference is made in the document to where the copies can be located



..To bid or not to bid

- ..Evaluation Criteria

- ⇒ Rated Criteria

- The intent of rated criteria is to score the respondent on how well their response did compared to the evaluation criteria
- Each rated item will have a individual weighting
- Score yourself using the rated criteria
- Score yourself against known competitors using the rated criteria and apply the individual weightings
 - How did you score vs. the known competition?
 - Do you have a very good chance of winning this business?



..To bid or not to bid

- Can you be price competitive?
 - ⇒ Cost to deliver
 - Real cost (\$)
 - Time and effort
 - Travel - meetings, site visits etc..
 - Out of province or out of country travel
 - The cost of doing business at a distance
 - Beware of cash flow
 - Are the payment milestones reasonable
 - Try to get progress payments vs. milestone payments



..To bid or not to bid

- ..Can you be price competitive?
 - ⇒ ..Cost to deliver
 - Required margin
 - Your internal profit requirements
 - Sensitivity of the evaluation process to price
- Fair and open
 - ⇒ Is the opportunity favouring a certain type of company or individual
 - ⇒ Are the evaluation criteria subjective or objective
 - ⇒ Are the evaluation criteria, weighting and process stated and clear



..To bid or not to bid

- Cost to bid

- ⇒ Real cost (\$)

- Time and effort
 - Travel - bidders meetings, team meetings, site visits etc..
 - Out of province or out of country travel
 - Pre-contract business development costs

- ⇒ Opportunity cost

- What could you be pursuing or doing to increase your chances on other opportunities



..To bid or not to bid

- Why do you want this business
 - ⇒ Core business
 - Is this your core business?
 - ⇒ Strategic
 - Gain experience
 - Keep the competition out of your territory
 - Leverage off of for another opportunity
 - Insight into an up and coming opportunity
 - ⇒ Keep resources busy
 - ⇒ Keep competitors out



The Response Budget

Deciding on the right time/\$ investment

- Optimum investment = minimum required to win the business

Enough to:

- ⇒ Be 100% compliant
 - Pre-qualification requirements?
- ⇒ Information gathering (trips?)
- ⇒ Get the (maximum or required?) points
- ⇒ Look and feel professional
- ⇒ Differentiate your proposal



...The Response Budget

Deciding on the right time/\$ investment

- Some good questions
 - ⇒ Who is the audience -- what do they expect?
 - ⇒ Who else is bidding -- what will their bids look like? Does it matter?
 - ⇒ How much can you afford?
- Make it a conscious decision and manage the result of that decision
- Don't under-budget
 - ⇒ Reputation cost of a bad job can be very high



The Schedule

- Team selection
- Planning
 - ⇒ Proposal strategy
 - ⇒ Assignments
 - ⇒ Schedule
 - ⇒ Reporting
 - ⇒ Authority
 - ⇒ Production



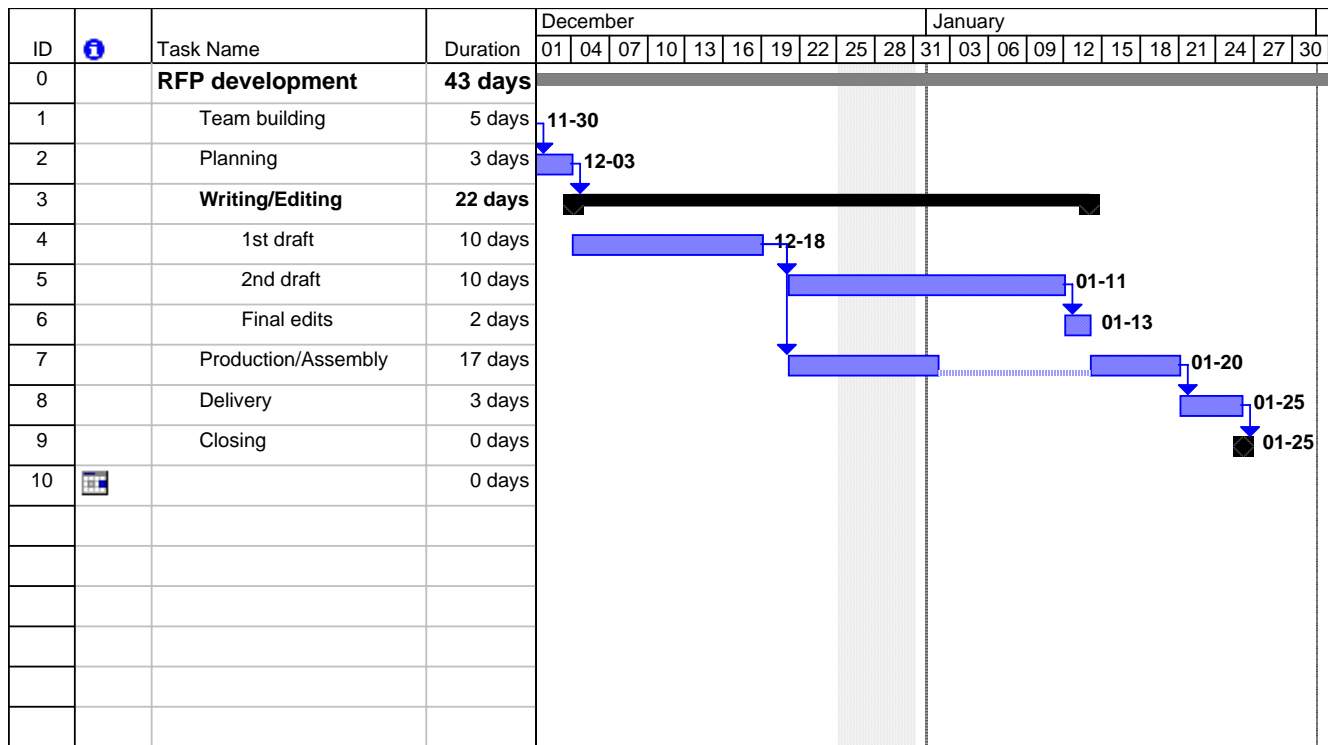
...The Schedule

- Writing/Editing
 - ⇒ Drafts schedule
 - ⇒ Review process
- Production/Assembly
 - ⇒ Early draft delivery
 - ⇒ Final review/sign-off
- Delivery
 - ⇒ Backup plan



...The Schedule

For an RFP closing on January 25





The Teams

- The Project (Delivery) Team

- ⇒ Those who will work together to execute (deliver) the project

- The Proposal Team

- ⇒ Those from the project team who will develop the response (subject experts)

- ⇒ Additional resources required to develop the response

- bid development experts
 - writers/editors
 - critics
 - layout specialists
 - production/printing resources



..The Teams

- When to team
 - ⇒ You need it
 - To fill in skill/experience/subject matter gaps
 - Let the evaluation criteria dictate
 - You are short on resources and the work is strategic
 - You lack a relationship with the client
 - ⇒ The client wants it
 - Read the lines in the RFP (evaluation criteria)
 - Read between the lines in the RFP
 - Ask around
 - Ask the client



..The Teams

- Teaming Options

- ⇒ Prime

- You have the bulk of the subject matter knowledge
 - You can manage the risk

- ⇒ Subcontractor

- When you have specific subject matter expertise
 - You don't want to take on the risk

- ⇒ Partner

- You have a key component of the required expertise
 - You want to share the risk



..The Project (Delivery) Team

- How to build one
 - ⇒ Start immediately or lose your options quickly
 - ⇒ Attend the bidders' briefing -- network
 - ⇒ Get something on paper
 - especially if you are a subcontractor
 - ⇒ Who do you think is the most likely winner?
 - Consider teaming with them



..The Project (Delivery) Team

- Participants

- ⇒ *Partners* -- those willing to invest in the bid and the project and to share risks (exclusive)
- ⇒ *Sub Contractors* -- those with skills or experience to contribute (exclusive)
- ⇒ *Suppliers* -- those with products or services required for the project (non-exclusive)



..The Proposal Team

- How to build one
 - ⇒ Start immediately or lose your options quickly
 - ⇒ Who have you used before?
 - ⇒ Ask around
 - ⇒ Delivery and quality are much more important than price



..The Proposal Team

- Participants
 - ⇒ Bid development experts
 - ⇒ Writers/editors/subject matter experts
 - ⇒ Critics
 - ⇒ Layout specialists
 - ⇒ Production/printing resources



..The Proposal Team

- Response Project Manager
 - ⇒ Responsible for the overall quality and timely delivery of the proposal
 - ⇒ Often not the same as, reporting directly to, the “boss”
 - ⇒ Needs time to manage the process
 - ⇒ Should be exacting and demanding
- Delivery Project Manager
 - ⇒ Often, but not always the same as the Response Project Manager



..The Proposal Team

- Response writers
 - ⇒ Subject experts vs. good communicators/writers
 - Having both is ideal, generally you have to chose
 - ⇒ Split up the document
 - Don't overload your good resources
 - If possible, let people do what they like best
 - ⇒ Every section should be read/edited by another subject-knowledgeable person (QA)
- Best: Have a separate proof reader and style editor



..The Proposal Team

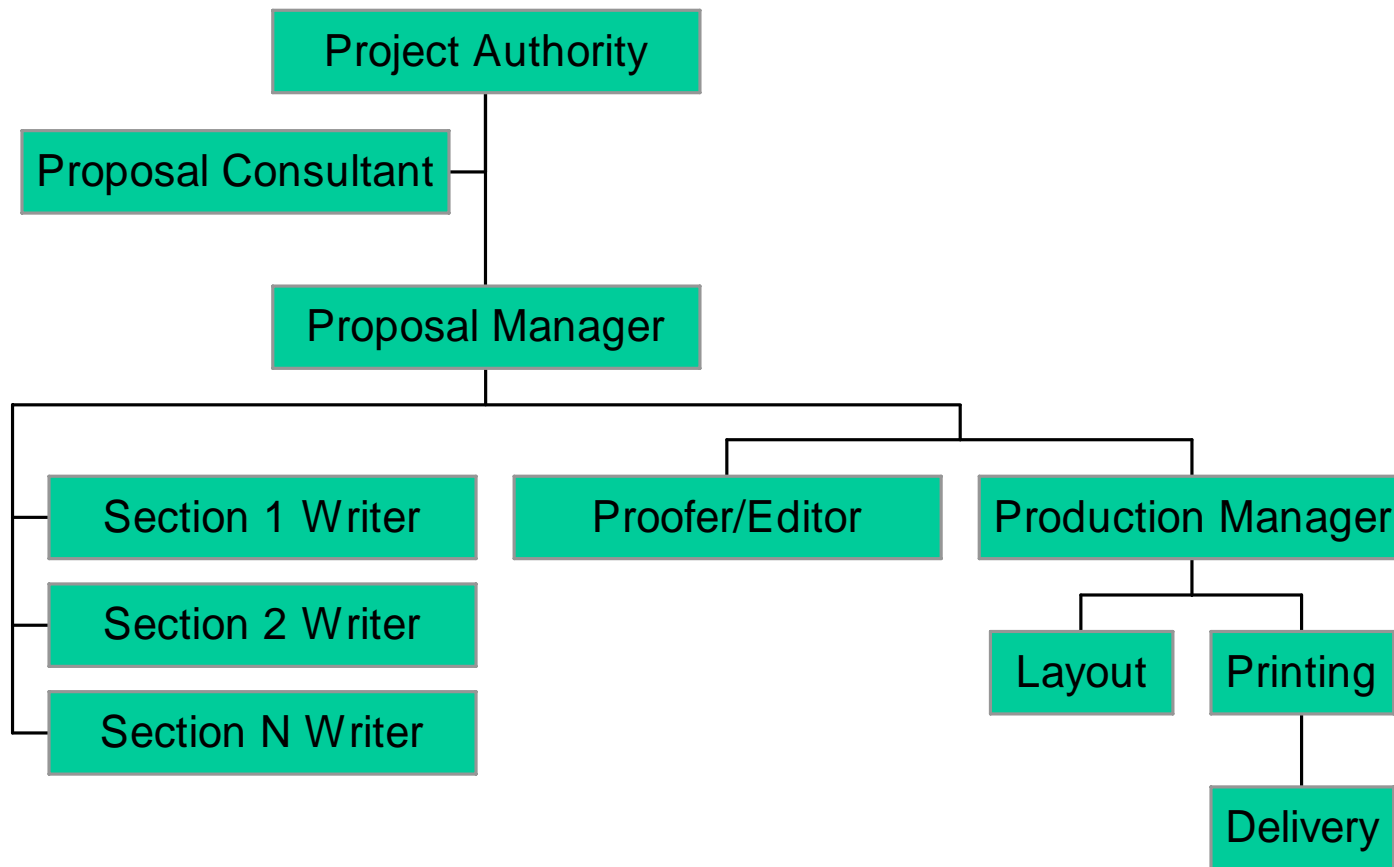
- Production

- ⇒ Layout -- responsible for the look and feel of the document
- ⇒ Printing -- responsible for physical printing and assembly
- ⇒ Delivery -- responsible for getting the document to the client before the closing time



..The Proposal Team..

Team Organization





..The Team

- Summary



The Strategy

Score yourself using the published evaluation criteria and weighting

Do a competitive analysis by scoring your competition

Identify your “win themes”

Map them to the evaluation criteria



..The Strategy

- Non-Financial

⇒ When you have decided how you can win the business..

- Write to the evaluation criteria
- Project your strengths
- Shore up your weaknesses
- Identify and state your competitive edge
- Don't criticize your competition



..The Strategy

- Financial

- ⇒ Objective: highest possible bid that will still win the business
- ⇒ Do pricing based on:
 - The published evaluation process
 - Your competitive analysis
- ⇒ You do not always have to be the lowest price
- ⇒ Too low a price may LOSE the business!



The RFP Process

- ⇒ Establish Evaluation Criteria
 - How to evaluate and score
 - Determine
 - Importance of each item - weight
 - Process
- ⇒ Create the RFP
 - Publish requirements and evaluation weightings
- ⇒ Evaluate the RFP
 - Based on pre-determined evaluation process and criteria
- ⇒ Select successful respondent



The Life of an Evaluator

- Pre RFP release
 - ⇒ Took part in the RFP development including evaluation criteria
- While the RFP is “on the street”
 - ⇒ May assist in answering any clarifying questions
- When the RFP responses are submitted
 - ⇒ Gets briefed as part of the evaluation team
 - Process and ethics
 - Evaluation criteria
 - How to score



..The Life of an Evaluator

- ..When the RFP responses are submitted
 - ⇒ Gets assigned the bid evaluation order and timeframes
 - ⇒ Reviews each bid before scoring
 - ⇒ Scores the bid independently with comments
 - ⇒ Attends a challenge session with other evaluators for consensus development with comments



Evaluation Methodologies

- Low cost compliant
 - ⇒ Pass all the Mandatory requirements and the lowest cost wins
- Cost vs. points
 - ⇒ No predetermined weighting of cost vs non cost items
 - ⇒ Pass all the Mandatory requirements
 - ⇒ Scores are given for Rated requirements = points
 - ⇒ The price is calculated



.. Evaluation Methodologies

- Default Scoring Scale

Unless otherwise indicated, assess responses according to the following 0-5 Rating Scale:

- ⇒ 5 - Excellent response. Meets or exceeds reasonable expectations and requirements
- ⇒ 4 - Meets expectations and requirements with minor issues. Response lacked insight or detail.
- ⇒ 3 - Meets expectations and requirements with significant issues. Response lacks evidence.
- ⇒ 2 - Does not meet significant expectations. Response shows lack of understanding
- ⇒ 1 - Minimally meets requirements. Response is unconvincing, empty claims.
- ⇒ 0 - Does not meet requirements.



..Typical Evaluation Methodologies

- Defined scoring

E.g.

⇒ 1 point for each of the following

- ...
- ...
- Etc.

Max 5 points

⇒ 1 point for each year, max 5



..Typical Evaluation Methodologies

- Each rated criterion is scored up to an arbitrary, pre-defined maximum (0-5, 0-10, 0-100, etc.)
- The evaluated score is divided by that maximum and the result is multiplied by the criterion weight (relative importance)
- The results for all rated criteria are summed to arrive at the overall weighted score
- The highest overall weighted score determines the winning proposal



..Typical Evaluation Methodologies

- Weights for the LTCB RFP
 - ⇒ High-level (In Section 4)
 - ⇒ Detailed (In Appendix I)



..Typical Evaluation Methodologies

- Evaluators' Guidelines

- ⇒ Score evidence, not claims or hearsay
- ⇒ Do not 'mine' for points
- ⇒ Outside knowledge **can** be used to reduce scores where statements are known (and can be shown) to be false or unable to be substantiated
- ⇒ Outside knowledge **cannot** be used to increase scores where the evaluator knows of capabilities that were not stated in the response



The Proposal Document

To win, you must convince the evaluators you can do the job -- and do it better (more cost-effectively) than your competitors.

- Objective:

- To get the maximum number of points for each evaluated section

- To make the evaluators' decision in awarding the maximum points as easy as possible



..The Proposal Document

- Content

- ⇒ Follow instructions to the letter

- The value of highlighting
 - Signing of forms
 - Maximum page lengths
 - ...

- ⇒ Balance the response vs. the evaluation criteria (lines or pages/point)

- ⇒ Address every point -- and sub-point



..The Proposal Document

- ..Content

- ⇒ Be brief and concise -- or risk alienating evaluators
 - Avoid “So what?”’s
 - Watch your language
- ⇒ Facts and supporting evidence, not unsubstantiated claims
 - Test with “Says who?”
- ⇒ Differentiate -- stress your superior differences
- ⇒ Cooperative confidence, not arrogance, not trepidation



..The Proposal Document

- ..Content

- ⇒ Commit where commitment is sought -- or you won't get the points
- ⇒ Check and prepare your references
 - Make sure they are reachable
 - Make sure they are supportive
- ⇒ Résumés
 - Cameos in the body vs. CVs in appendices
 - Customize CVs to suit the project
- ⇒ Proof read, spell check and edit
- ⇒ Incumbents -- they expect more, they know...



..The Proposal Document

- Independent critiquing and scoring
 - ⇒ Timing/Iterations?
 - Green Team Review -- after the first complete draft
 - Red Team Review -- after the 'final' draft
 - Leave sufficient time to make changes
 - ⇒ Double check mandatory requirements and required certifications
 - Have someone “new” do it



..The Proposal Document

- Production

- ⇒ Involve production team early
- ⇒ Establish tools, standards and compatibility issues (word processing, spreadsheets, graphics, DTP tools)
- ⇒ Style and presentation
 - Professional look and feel
 - Appropriate for the client/situation
 - Handle-ability (for the evaluators)
- ⇒ Proof read and edit for printing/layout errors



..The Proposal Document

- Delivery

- ⇒ Plan your delivery

- Make pick-up arrangements in advance
- International -- special considerations

- ⇒ Verify closing time, address, requirements by phone one week before closing

- ⇒ Have alternate delivery arrangements ready

- ⇒ Allow time for last minute problems -- you will have them

- Ideally, enough time for a second, on-time delivery



The Oral Presentation / Interview

- Purpose of an Oral Presentation / Interview
 - ⇒ To verify respondent's responses to the RFP
 - ⇒ To meet the key individual(s)
 - ⇒ To see how the individual(s) react to a live situation
 - ⇒ To confirm or get additional commitments



..The Oral Presentation / Interview

- The Cast

- ⇒ Key personnel

- Bring the people who can make the commitments
 - Bring the personnel proposed or the experts
 - Bring a senior executive to show support - not necessarily to present
 - Not a place for marketing personnel



..The Oral Presentation / Interview

- The Cast

- ⇒ The Director

- Someone should be in charge of the oral presentation
 - If there is a project manager proposed for the he/she should be leading the presentation and directing question responses



..The Oral Presentation / Interview

- Content

- ⇒ Follow instructions to the letter

- ⇒ Assigned topics or questions

- Balance the response with the evaluation weighting
 - Have the expert reply
 - Senior executive and marketing people are not necessarily experts



..The Oral Presentation / Interview

- Content

- ⇒ Cover all assigned topics

- No marketing
 - Be concise and to the point
 - Bring supporting evidence if possible
 - Be subtle when differentiating - do not slam your competition



..The Oral Presentation / Interview

- **Choreography**

- ⇒ Use the media most comfortable to everyone

- This is not a presentation contest
 - The clarity and the content of the visuals are most important

- ⇒ Rehearse

- Have the entire team present
 - Time the presentation
 - Video the rehearsal
 - Have the presentation scored and critiqued
 - Rehearse, rehearse and rehearse



..The Oral Presentation / Interview

- ..Choreography

⇒ Follow up questions

- Try and identify follow up questions in advance
- Rehearse the answers
- Decide in advance who will answer what type of questions
- Have the expert reply
- A senior executive should reply if addressed from the panel or from their own team



..The Oral Presentation / Interview

- Presence

- ⇒ Confidence

- Everyone expects and understands you will be nervous
 - Do not sacrifice confidence for style or uncomfortable media
 - Lack of confidence come from
 - Not being prepared or rehearsed
 - Not understanding what has been proposed
 - Lack of subject knowledge
 - Lack of confidence shows in your
 - Voice, mannerisms, body language



..The Oral Presentation / Interview

- Presence

- ⇒ Preparation

- Know

- The proposed solution

- Who is on the interview panel and what is important to them

- You must rehearse

- Body language says lots

- Review the video tape for body language

- The body language of everyone even if they are not presenting is important



..The Oral Presentation / Interview

- ..Presence

- ⇒ Style

- The team has to adopt a style
- Try and pick the style that is most comfortable

- ⇒ Team Impression

- A team of champions or a championship team
- Show confidence in your team members
 - Beware of your body language
 - Do not contradict - clarify



..The Oral Presentation / Interview

- Production

- ⇒ Venue

- Visit the venue in advance of the Oral
 - Gives you an idea of how to set up
 - Allow sufficient time before the oral to set up and rehearse

- ⇒ Equipment

- Bring back-up equipment, components and media
 - This is not a multimedia event
 - Bring someone who worries about the set up and operation of the equipment



..The Oral Presentation / Interview

- Why do they win?
 - ⇒ Best team
 - ⇒ Committed
 - ⇒ Have been there and done it before
 - ⇒ Understand how to approach the situation
 - ⇒ Strong project manager
 - ⇒ Strong subject matter expertise
 - ⇒ Can work with the individual(s)
 - ⇒ Can trust the individual(s)



Debriefings

- Client Debriefing

Do..

⇒ Ask for as many details as possible

- How proposals was evaluated
- What it would have taken to win

⇒ Use the debriefing as a learning process

⇒ Obtain information to explain

- What the team did right/wrong
- How to win next time
- When the contract will be up for renewal



..Debriefings

- ..Client Debriefing

Do not..

- ⇒ Get angry
- ⇒ Criticize the process
- ⇒ Slam the competition



.. Debriefings

- Team Debriefing
 - ⇒ What could you do better next time
 - ⇒ Any immediate actions?
 - ⇒ Would you do it again?