



# The RFP Game: To Play or Not to Play?

by Barbara Berry

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**R**FPs—“can’t live with them, can’t live without them.” From a vendor’s point of view, requests for proposals frequently present this problematic double-edged sword. Doesn’t it seem that RFPs typically arrive when you’re either swamped with work or starving for work? Neither is an ideal situation for decision making. If swamped, you might set aside a potentially great opportunity. In the latter situation, you might spend time writing a response when the project and/or the requestor are not a good match for you.

Since, most likely, you *can’t* live without RFPs, the question becomes one of how to make a sound decision about whether or not to respond.

Requestors often use a set of criteria to evaluate responses to their RFPs. Why not employ the same technique when deciding whether to respond? While there is no foolproof decision making method, the *RFP: Go or No Go?* checklist below is a tool you can use to stimulate a discussion with yourself or with colleagues about whether to respond to an RFP.

It was developed based on interviews with experienced exhibition developers and designers who shared their thoughts on how they make a “go/no go” decision. Based on your own experience, you may have other criteria to add.

## Evaluating an RFP

Here’s how to use the *RFP: Go or No Go?* checklist to help evaluate whether or not to respond to an RFP.

### Step 1: Read the RFP thoroughly and critically.

The RFP provides a structure for requestors to identify their project requirements so vendors can understand their needs and use the information to create a response. The biggest source of confusion for vendors (and, ultimately, disappointment for requestors) is probably the poorly written RFP.

Be sure you understand all of the RFP criteria and requirements. On your initial read, list your questions and identify any red flags.

If questions arise, get clarification prior to moving forward. Nearly all RFPs set aside a Q&A period for potential bidders. If this is offered, take advantage of it. If it isn’t offered, consider it a red flag—the requestor may already have a vendor in mind.

### Step 2: Ask yourself some important questions.

#### Administrative Information

A well-written RFP clearly spells out what the requestor expects the bid package to include, thereby providing a level playing field for all bidders. If proposal deliverables are unclear, it’s too easy to enter into a competition that isn’t being judged “apples to apples.”

Knowing how your proposal will be scored and by whom can help you decide how to apportion your time and, possibly, how to position parts of your proposal.

Look for any pre-qualification requirements. If you don’t meet them, don’t invest time and resources in answering the RFP.

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#### **Working Relationship**

Remember, you will be working closely with the requestor institution if you win the contract. The RFP process can give an indication of the future working relationship.

Consider the requestor's experience with the exhibition development and design process. If they're inexperienced, realize there may be a client education process involved. While that doesn't signal a “no go” situation, be sure to factor the necessary time/money for it into your bid.

Whether a potential client is inexperienced or seasoned, it is important to think about how the collaboration will work out. If a requestor has asked you to describe your process, it's a clue that they are more likely to be ready, willing, and able to collaborate effectively.

Last, but not least, consider whether the prospective client is a good match for you/your organization. A good match of personalities or cultures typically makes for a more successful end result on many levels.

#### **Competition**

The size of the bidding pool has a direct result on your ability to win the contract. An open bid with many competing vendors can be less attractive than a competition in your own backyard with a limited number of bidders. Play the better odds.

If you know that a competitor has previously worked with the requestor, realize that the probability of unseating an incumbent lowers your odds.

#### **Connections**

If you have a positive prior connection with the requestor, it is typically a plus. If not, consider whether you have an opportunity to make a personal connection with the requestor, or if you can team-up with individuals who have established connections.

While not always possible, speaking with a decision maker from the requestor institution can help put your proposal out in front. Try to get a verbal understanding of the institution's needs. Find out what problems they have had in the past and address them in your proposal.

#### **Scope of Work**

Beware of RFPs that are vague about the scope of work. If the requestor hasn't spent the time to think through what is needed to complete the project, internally and externally, it's not a good sign. Vague information often signals a weak RFP team, and a confused or conflicted project. This type of weakness does not bode well for the future of the project.

If the RFP contains little or no tangible information on which to base a proposal, the effort required to gather the information becomes an investment of time and/or money you may decide not to make. And, if you ask for further clarification and don't get it, it's a clue the requestor may already have a vendor in mind.

If the requestor is unable or unwilling to provide clear, accurate information at the outset, it is fairly safe to assume that an ongoing relationship is likely to be high maintenance.



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#### **Skills & Resources**

Consider the amount of time and people resources required to answer the RFP. Crafting creative, detailed proposals takes time. Look at your own timetable and resources and avoid over committing.

Every project requires specific skills for execution. Before deciding to answer an RFP, look at your skill set and decide whether you can realistically meet the needs of the requesting institution. If you don’t have all the available resources for answering the RFP or executing the project, it doesn’t automatically signal a “no go” decision.

Are there individuals or organizations you could effectively team with to develop the proposal and/or complete the project. Do you know who the other bidders are? If so, you can make a proposal to one or more other bidders, offering your services for the part of the proposal that is uniquely within your experience set. In essence, you become a subcontractor on the project.

#### **Potential & Profitability**

Rather than respond to every RFP that comes your way, determine what sort of projects and institutions you want to work with to build your business. If you should win the contract, assess whether it will be the best way to allot your resources.

Assess the size and scope of the bidding project to determine how much the contract will be worth. Weigh the time and costs involved in submitting a proposal against the potential revenue gain and term of the contract.

#### **Passion & Philosophy**

Not every decision is made solely on dollars and cents. Consider your personal passion and/or your business philosophy. Remember, it is often these “soft” factors that will sustain you through stressful or tiring times.

#### **Step 3: Tally your ratings.**

It is not a universal given that you should respond to every RFP. Because of the substantial time and resources involved in providing a thorough proposal, be selective and respond only to the RFPs that appear to be winnable.

Take the time to reflect on your ratings. Discuss them with your colleagues and get their input. “Yes” answers are a good sign. Too many “No” or “Maybe” responses might indicate that a “no go” decision would be best.

Making the decision whether or not to answer an RFP is a critical step. Ultimately, winning at the proposal game means looking carefully at your options and assessing the risks. As with a poker hand, “you got to know when to hold em, know when to fold em.”

### **Moving Forward – A Few Tips**

If you do decide that a contract has potential benefit for your organization, set aside time for a thorough and articulate response. RFP responses are often put together at high-speed and under intense pressure to complete the proposal on time. All this while trying to ensure that all aspects of your response meet the RFP guidelines—not an easy task!

**Take these steps to improve your position as you begin to craft your response.**

**Re-read the RFP carefully.**

Reacquaint yourself with the details of the requestor's stated problem or need, as well as the requirements for responding. Nobody gets all the information or nuances on the first reading. Be prepared to study it and continue to ask questions as needed.

**Formulate a response strategy.**

Develop a response procedure to minimize the downtime from paying work. You can, for example, devise a template that includes the information common to most proposals.

Prepare a flowchart that shows what needs to be done and how you would complete the necessary tasks. This helps to define the process and provide you with a plan of action. When you're ready to draft the actual proposal, you'll also have an outline ready.

**Follow the rules.**

Check, double check and triple check every RFP item and your response. Failing to meet


even a single item in an RFP can remove you from the bidding.

**Follow up**

After submitting an RFP, follow up with the institution to ensure your response was received. Hopefully you will already have built a relationship with someone at the institution by taking advantage of the Q&A period or attending a pre-bid meeting.

Establishing a rapport with someone demonstrates your understanding of the institution and their need, as well as your commitment to the project. Show them you would make a good partner and you can increase your chances of winning. Even if you don't win this contract, the relationships you build will help with the next opportunity.

**Feedback**

And finally, if you do miss out, ask for feedback. You'll never learn what to do differently or better the next time unless you get some insights 

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# RFP: To Go or No Go? Checklist

Need to make a decision about whether or not to respond to an RFP?  
 Answering these questions can help you reach a solid “go” or “no go” decision.

## 1 - Read the RFP thoroughly and critically.

Do you have questions? Are there red flags?

### Questions

### Red flags

_____	_____
_____	_____
_____	_____
_____	_____

## 2 - Respond to each question using the ratings shown below.

✓ = Yes    X = No    ? = Maybe    NA = Not applicable

Don't overanalyze. Go with your instinct. Then discuss the outcomes with your colleagues to make your “go” or “no go” decision.

Administrative Information		
Do respondents have an opportunity to point out red flags or concerns?		NA
Are the guidelines for submitting a successful bid clear?		NA
Is the assessment or scoring criteria clear?		NA
Is it clear who will review the bids?		NA
If there are pre-qualification requirements, do you meet them?		NA
Working Relationship		
Is the requestor knowledgeable about exhibition development and design?		NA
Has the requestor asked how you manage the exhibition development/design process?		NA
Is the vendor/client working relationship clearly outlined?		NA
Is there is a good personality and/or culture match between you and the requestor?		NA
Competition		
Do you know how many bidders there are?		NA
Do you know who the other bidders are?		NA
Has the competition worked with the requestor in the past?		NA
Can you be either the “best qualified” or “lowest bidder?”		NA
Connections		
Do you have a prior connection with the requestor?		NA
Is there the opportunity to make a personal connection with the requestor?		NA
Can you search out additional information that will help your proposal stand out?		NA

<b>Scope of Work</b>		
Is the scope of work for the contract clearly defined?		NA
Is the square footage for the exhibition identified?		NA
If the budget is disclosed, is it realistic?		NA
If the schedule is disclosed, is it realistic?		NA
Are vendor and client responsibilities clearly defined?		NA
<b>Skills &amp; Resources</b>		
Do you have the resources (time and people) to create a winning proposal?		NA
Do you have the skill sets needed to complete the project?		NA
Do you have the resources to fulfill the contract if you win it?		NA
Are there individuals/organizations you could potentially partner with?		NA
<b>Potential &amp; Profitability</b>		
Does the institution or project match your target market?		NA
Will the project add to your portfolio?		NA
Is there potential for leveraging this contract into future business?		NA
Does the potential revenue gain balance against the time/cost involved in submitting a proposal?		NA
<b>Passion</b>		
Are you interested in or passionate about the subject of the exhibition?		NA
Will the project enable you to make a meaningful contribution to the requestor organization and/or the field?		NA
<b>Other</b> (add your own criteria)		
		NA
		NA
		NA
		NA

**Step 3: Tally your responses and reflect on the outcome.**

More “yes” answers are a good sign!

\_\_\_\_\_ # No      \_\_\_\_\_ # Maybe      \_\_\_\_\_ # Yes      \_\_\_\_\_ # Not Applicable

