

Conquering the RFP!

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There's nothing quite like the RFP – simultaneously bringing the hope of new business and the promise of lots of “unpaid” work crafting a thoughtful response. The process is a little like taking a standardized test – working very fast to meet a stressful, seemingly arbitrary deadline, trying to figure out what the test-maker is really asking, and trawling through your past experiences trying to find applicable and reusable knowledge: “Wait, I know I’ve seen that one before!”

Responding to RFPs also feels a little like sending a spaceship into a black hole - you don't know when or if it'll ever return (and if it does return, what's lurking inside). In addition, you rarely get feedback on what was effective and what wasn't, or know how you really compare with your competitors. Many companies stick to their one tried and true approach, and have accepted a sub-optimal level of success. Here are some symptoms that your proposal development could be improved:

- Low or falling proposal win rate
- Proposals take too long to complete – feels like you're reinventing the wheel
- RFPs are like “hot potatoes” – each one gets passed around until someone gets stuck with it, with valuable time lost
- Proposals are just too long – bloated, lacking focus and clarity
- Completing a proposal is like a scavenger hunt through your organization's resources, distracting you from thinking through and proposing a winning solution

The good news is that a few changes may dramatically improve results. My firm, AG Infonet, recently completed a brief consulting engagement where we helped a client improve their proposal development via up-front analysis and creation of new templates and tools. Here are some guidelines and ideas to help *your* company reap a higher return on its proposal writing activities.

Don't be afraid to ask. Writing a strong, even winning, RFP response typically requires a healthy dose of mind reading. But we're not all mind readers! Asking for clarification about a particular aspect of the proposal, while not explicitly encouraged, is usually taken well, and often leads to insights into the context of the project, what the client is really looking for, and sometimes much more – even budget guidelines. You just don't know until you ask. Provided you don't oversell yourself, asking the client questions gives you an opportunity to demonstrate your knowledge of their business, and also attaches a voice, if not a face, to the proposal you submit.

It's ok to be selective. Before anyone starts writing a response, your own company needs to ask itself: Are we sure we should be responding to this proposal? Is this the kind of

business/client/industry we want to be in? What do we know about this client (e.g., are they too price-driven, too high-maintenance)? In reality, some work simply is not worth it, or too far from your company's strategy, to pursue. It takes much discipline, especially in these days of reduced spending and fewer RFPs being issued, to say no to a proposal. But walking away from an opportunity can sometimes be perceived positively by clients, and if your resources can be profitably redeployed elsewhere, then the no-go decision is wise.

Reduce the pain. Acknowledge that responding to an RFP means a significant commitment of resources, and look for ways to make each RFP response less labor-intensive. An effective proposal-writing approach will enable the responders to leverage past work and effortlessly utilize the most current information to be included in the response. These are really knowledge management issues, and often surprisingly thorny.

The goal is to create reusable content objects that can be customized easily so they don't read like "boilerplate". Some organizations choose to use a single, generic template; others rely on modifying (and updating) past proposals. Regardless of your specific template and development strategy, the key is to build off the existing work processes and skills of the proposal writers themselves, as well as the organization's technology infrastructure and tools, geography, and other considerations.

Reducing pain sometimes means creating special tools. For example, one client requested embedded easy-to-use spreadsheet templates so that cost calculations can be done from within the proposal. A different organization conducts virtual whiteboard cross-functional proposal team meetings, running project-planning software, which they are comfortable inserting into proposals later.

Templates are notoriously difficult to manage and keep current – it's the leaky roof syndrome: when it's raining, you remember you've got to fix that leak, but you spend your time cleaning up the mess. Then it stops raining and you think – well there's no problem now ... until it rains again!

Clear, simple structure. While the solution you are proposing may be technically complex and sophisticated, the proposal itself must be easy to understand. It's important to follow a templated, simplified structure – a disorganized proposal can't be a good sign that this company will execute and manage the proposed project well. As a check, try to summarize in one paragraph why choosing your company will make the project a success – then structure the response to flesh out this summary.

A strong, clearly and simply organized structure is especially important if multiple people are working on different proposal pieces. Well-crafted RFPs often require input across multiple functional areas – and this requires coordination and cooperation, as well as structuring the proposal to facilitate "dividing and conquering." Doing so avoids ending up with overlapping (or missing) pieces, or pieces that don't fit together quite right.

Reduce your potential client's stress. Escape from your company-centric view and when structuring a response try to view the situation from your client's perspective. There's risk in choosing a vendor, especially a new vendor, and any way to lessen the perceived risk is well

appreciated. To decrease their stress, proposals need to state clearly and support the following: we know your industry; we know your offerings; we truly understand what you are trying to accomplish and why you are doing this project – the challenges, and the value to the organization if properly executed; we've completed similar projects successfully; we have great references who can vouch for our competence; we've assembled a strong project team; we're easy to do business with and work with on a daily basis; and moreover we want your business! If you can say these things honestly, and communicate them clearly, then you'll be making a powerful argument for selecting you.

Short and sweet. As Benjamin Franklin once wrote to a friend, "If I had more time, I would have written a shorter letter." Shorter - more concise and readable – is definitely better. Think of those poor proposal readers who have to sift through reams of hastily written, vendor-speak asking themselves "Where's the beef," trying to evaluate whether choosing this vendor will make them look like a hero or a goat! Proposals built from prior proposals tend to get bloated over time with information that might be interesting but not apropos. Sometimes there is too much detail in such areas as company background, project methodology, and other mind-numbing or distracting details. Ask yourself, "Can I omit this piece and not lose any impact?"

Appendicize. One way to keep the main body of your proposal concise is to jettison non-essential items to one or more appendices at the back of the proposal. Appendix candidates include details on past relevant projects, resumes of key resources, supplier questionnaires, samples, project methodology and client references. An appendix can add "umpf" at the end of the proposal as well as make the proposal flow better. But watch out for bloated appendices as well – you want an umpf, not a thud!

Well-chosen glitz. While purely cosmetic glitz earns precious little with proposal readers, there are certain ways to make a memorable impact. For example, you can give the decision committee an opportunity to *experience* the solution you are proposing – a password protected web site with a sanitized sample of the kind of work you've done which is relevant to this project. If you do this though, make sure you add disclaimers that their proposed solution will be tailored exactly to their specified needs and won't necessarily include the specific features and functionality shown in the sample (unless that is requested, in which case you'll want to adjust the scope!). Of course, make sure it works perfectly – on all browsers and platforms! On the more mundane side, judicious use of color, and some simple graphics to illustrate your solution and break up the text, also contribute to your proposal's impact. But don't choose glitz at the expense of thorough editing and proofreading.

Get feedback! Perhaps most importantly, whether you win or lose the bid, find out why. This step is so critically important, yet so often ignored. The gathering of feedback is best done informally, at the moment of notification, when the bids and circumstances are fresh in the client's mind. If that moment has passed, it's not uncommon for the firm to ask a consultant to perform a win-loss analysis; these consist of meeting with the client as well as the internal proposal-writing team to learn why you were not chosen and figure out ways to improve. Most clients are surprisingly receptive toward providing feedback – it even builds the relationship and makes you stand out from the pack.

Over the years, I've heard some fascinating feedback on my own proposals: "too expensive," "not enough hours," "too many senior people involved," "we're afraid we'll be spreading your resources too thin." These feedback sessions reinforce how different it is to be in each other's shoes! But any opportunity to hear from a client about your proposal is rare and wonderful, and is immeasurably handy for improving future responses.

By improving your organization's proposal development skills, tools, and processes, your success rate may improve and you'll gain clients whose future work may not be sent out to bid!

About the Author

Matt Adlai-Gail is EduNeering's Chief Innovation Officer, where he provides leadership and coordination to the firm's extensive research and development activities. Eduneering provides leading-edge knowledge solutions to a wide range of regulated industries. Before joining EduNeering in 2005, Mr. Adlai-Gail was the principal of AG Infonet, the management-consulting firm he founded in 2000. In that capacity, he provided consulting services for organizational effectiveness and process improvement for the life sciences, healthcare and financial sectors.

Earlier, Mr. Adlai-Gail was a partner with DiamondCluster International, where he led a global consulting team to promote the sharing of knowledge and best practices for the Goldman Sachs Controllers group. Mr. Adlai-Gail also served as a consultant and principal with OmniTech Consulting Group, where he founded and headed the firm's East Coast Division, providing consulting and custom learning solutions to clients in the telecommunications and high-tech industries.

Mr. Adlai-Gail has worked both as a learning services vendor and as a client, and has consulted to services firms on ways to improve RFP win rate. Mr. Adlai-Gail holds an M.A.T. in education/mathematics from the University of Chicago and earned a B.S. and B.A. with honors from Brown University. He is a pioneer in blended learning solutions and a specialist in using technology to advance adult learning and improve business performance.

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