



**A view from the other side of the fence:
An agency guide to writing RFPs that actually work.**

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As the Director of New Business and Account Director at re:group, we receive numerous Request for Proposals and Quotes (RFPs and RFQs) from prospective clients. Of late, we have noticed that they are becoming more arduous and less helpful in telling us what they are trying to accomplish. Following a particularly bad experience this summer with the *Titanic* of all RFPs, we vowed to tell prospective clients what it's like to be on our side of the fence in responding to these proposals. So, here is our moment to wax poetic on the virtues of writing a clear and understandable RFP.

Do: Your homework!

If you don't know what you're doing, ask. If you've never written an RFP or been involved in selecting a new agency/partner, talk to marketing associates and people in your network who have. Don't be afraid to call some agencies, talk to the new business director and ask how you should structure the proposal to accomplish your objectives. Just today we received an RFP for a branding assignment. When we called the client to ask some questions we learned that they had recently assigned web site design to one agency, consumer research and strategy to another and this third RFP for branding was going to a different set of agencies. Had they talked to a seasoned marketing person they would have learned that it is usually much more efficient for one agency to work on the total project. We would have told them that the consumer research and strategy should be done first to inform the branding work and that the website should be done after the brand position and image are developed. In this case, no one agency will have the benefit of taking a comprehensive, holistic view to their marketing and they will probably spend more money than they should.

Do: Involve senior marketing management in the RFP process.

Marketing is a relationship-based business. I would venture to guess that most clients choose an agency for their work but also for their people. They want to know that they can communicate well with their agency partners. If you expect to work closely with the prospective partner, it is important for the senior marketing person to be involved in developing the proposal and in the selection process. It is very time consuming and frustrating for an agency to have to go back and forth with the "RFP gatekeeper" asking questions that could be covered more efficiently in a phone meeting with the client. In a recent RFP experience from hell it took 3 months, two rounds of email clarification questions, replying to a 30 page RFP, answering follow-up questions and finally receiving a creative assignment before we were able to actually talk directly to the client. While we understand the need to avoid a ton of phone calls to the marketing director, there has to be an efficient way for agencies to talk to clients about the proposal and ask questions. A short conference call to discuss the proposal is invaluable, and allows us to zero in on the issues much more quickly and efficiently. It will result in better responses and an early opportunity to get to know the different agency players.

Do: Tell us why we are receiving your RFP.

Tell us why you are sending out an RFP. It's the first thing we want to know. Are you 1) looking for a new partner relationship? 2) looking for a short-term partner for a project? 3) conducting an agency review because purchasing requires you to bid the account every few years? 4) are we on your preferred vendor list for quotes or 5) are you looking for a fast and cheap quote for a project? Please be honest. The reasons for sending an RFP may help the respondents decide whether they want to pursue the opportunity.

Do: Make sure the deliverables are clear.

You would be surprised at how many RFP's we receive where we are not exactly sure what the company is looking for. While it may seem obvious to you, it often is not to the recipient. Many RFP's have a lot of background information but they neglect to identify what their issues are and what help they need. For

example, “please outline how you would approach our marketing and the costs associated with it” will get you responses that are all over the place, and probably not relevant. Whereas “we would like a cost quote to develop, program and optimize a new web site based loosely on existing content” is succinct and clear. The more specific you can be about what you want to know, the more accurate and thoughtful the response.

Do: Think about what you expect the agency to present creatively.

Frequently, clients can choose an agency based on their previous strategy and previous creative work. However, some RFPs request that the agency provide spec creative, also known as a “creative shoot-out”. Sometimes the assignment is clear, but often it is not. Here is how we usually feel about this request: “It’s like asking a surgeon to operate without ever having seen the patient or the charts.” We believe that creative should be based on insight and intelligent strategy. Until we get to know you, that’s pretty hard to do, and you’ll probably end up having to start all over on creative once you award the account.

Creative pitches are also an expensive investment on the part of the agency. In addition to developing the marketing strategy, it usually takes a lot of creative hours to develop a few campaign concepts with print, broadcast and web components. Add to that the cost of preparing demo TV, music, radio or video and we could be looking at \$15 – 25,000.00 in expenses. Remember, agencies are also in the business to make money. Spec creative might be a good investment if the relationship will be long term and the revenue on the account can pay back the initial investment and yield a 20% return. However, if the revenue from your account is relatively small or the term of the project is relatively short then don’t be surprised when some agencies “decline to participate.”

If you do intend to ask for creative work and you feel this is the only way that you can make a decision about the agency, then you owe it to the participants to write a clear creative assignment and address what issues or opportunities you expect the creative work to solve. You can’t judge the work fairly if every agency is presenting a different interpretation of what they “think” you want to accomplish. And lastly on this subject, please give us enough time to actually come up with ideas and think them through. When we’re only given a few days, there’s just no way you’ll get the depth of thinking you deserve. Make it a competition of ideas, not a test of quick turnaround.

Don’t: Be vague!!!

Are you hiring hands or brains? Take the case of a large company who asked us to demonstrate “how we would approach their business”. No information was provided about their objectives and the marketing issues they wanted to solve. Along with many other agencies, we sent questions asking them to provide their marketing objectives. The response was, “We are unable to provide this information at this time.” You can imagine how frustrating it was to be asked for a point of view on their business with no sense of what they wanted to accomplish and what problems they needed help with. If you don’t trust us with your business information up front (yes, we will sign confidentiality agreements) are you going to trust the advice we give you later on? Why not challenge us by sharing enough business model info that we can propose on the basis of the value we will deliver you? We get our kicks by making you look good.

Do: Know it’s OK to ask for ROI and tracking metrics.

Metrics, metrics, metrics are the currency of today. It is OK for your proposal to ask for ROI and metrics on marketing performance. In these tough economic times we expect clients will need to justify every marketing dollar. But to do this we will need information about your business objectives, sales data, customer behavior, web analytics and what measurements are important to you. Are you trying to generate more sales leads via your website or on the phone? Are you trying to sell more product in retail stores? Are you trying to create word of mouth awareness and encourage your customers to recommend you to their friends and family via social media? If we know what you are trying to accomplish and measurements can be put in place we will be only too happy to provide you with expected results.

Don’t: Be afraid to provide a budget.

For some reason clients are hesitant to mention how much money they have to spend on a project or what they spend on communications on a yearly basis. The assumption is that if they provide the budget the agency will find ways to spend it all and or that they won’t receive competitive cost bids. This is a false assumption. The reason agencies like to know the budget is 1) to determine if the budget is in line with the scope of work expected and 2) so that they can determine the optimum approach for the money

available. We love to think about how we would approach a marketing opportunity and what we could do to best help a client. The difference between a \$20,000 budget and a \$500,000 budget makes a huge difference in how agencies craft solutions. Agencies can do their best planning when they know what they have to work with. If you make them guess then you may receive a plan that in no way represents your budget reality. If you don't know what your media budget is, for example, it is really hard to know what creative to recommend and how much it will cost. So, whenever possible provide a budget even if it is approximate. Agencies will be happy to itemize how your money will be spent. Then you can decide who provides the best value.

Do: Spell out specifics.

To avoid unnecessary questions it is advisable to include the following information:

- A list of agency/partner requirements and qualifications i.e. experience, case studies, requirements for the project, your staffing model so that the agency can think about how many people they will need to staff your account.
- A summary of how you will conduct the selection process- phases, key dates and list of decision-makers.
- An opportunity for all participants to email questions or preferably to have a phone briefing.
- How you want to receive responses- printed, disc or PDF.
- How many paper copies you will need? Please consider the environment when you ask for more than a few copies. One client asked us for eleven copies of our response, which was a 60 page, bound response to their 30 page RFP. Since there were at least 5 agencies in the running you could figure that at least 3,000 color pages were printed for just this one RFP. That's a lot of trees and paper for the recycle bin.

And lastly, Do: Consider our advice. You will receive more thoughtful responses and accurate estimates, which will save you and your prospective partners a lot of time. It will also build the foundation for a better relationship and outcome.