

MANAGING THE RFP PROCESS TO FIND THE RIGHT FIRM OR CONSULTANT

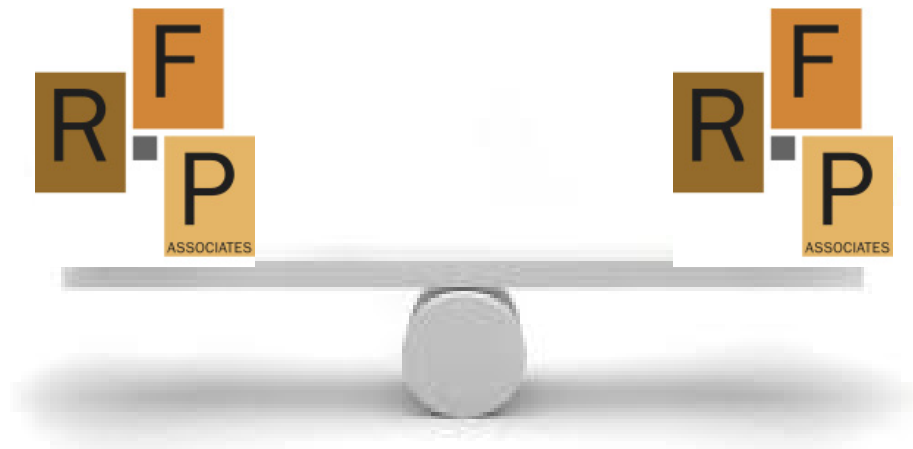
Steve Drake & Robert Udowitz
RFP Associates

Rich White
Auto Care Association



RFP ASSOCIATES: WHAT WE DO

- Manage agency selection process for clients/ hiring entities.
- Counsel on best strategy for hired agency.
- Improve RFP response for agencies.
- Serve as an honest broker.
- Lead with philosophy that playing field should be level.



AUTO CARE ASSOCIATION

- What we do
- Issue driving RFP process:
Automotive Telematics

autocare™
ASSOCIATION



AGENDA

- Introduction
- The RFP Process
 - Preparing the RFP
 - Issuing the RFP
 - Selecting the firm/agency/consultant (hooray!)
- Questions and answers

PRINCIPLES OF AN AGENCY SEARCH PROCESS

- **Organize and prepare**
- **Determine budget**
- **Gather committed evaluation team**
- **Create and adhere to timeline**
- **Pay for spec/creative work, but not ideas**
- **Maintain ethical standards**
- **Ensure robust information sharing**
- **Agree to mutual non disclosure**

HIRING AND WORKING WITH A FIRM

- **Infrastructure**
- **Departmental cooperation**
- **Access and availability**
- **A committed evaluation team**
- **Dedicated budget**
- **Create and adhere to timeline**



CONTEMPLATING THE END GAME

- **Consider the ultimate goal**
- **Pre-strategize**
- **Weigh necessity of an external resource**
- **Determine agency role**
- **Factor other allies and competitors**



ESTABLISHING SEARCH CRITERIA

- **Geography**
- **Industry expertise**
- **Relevant experience but no conflicts**
- **Size/reach**
- **Work well with other agencies**
- **Culture/chemistry**



DEVELOPING AND SHARING A BUDGET

- **Historically clients hesitate to disclose**
- **Agencies want and need to know**
- **RFP budget and final budget might/might not be same**
- **RFP budget allows apples to apples comparison**



BUDGET DEPENDS ON SCOPE

Average Rates & Utilization – 2014 & 2015

	Average Billing Rates 2015		Average Billing Rates 2014		Average Utilization 2015	Average Utilization 2014
President/CEO	\$	355	\$	366	36.2%	37.5%
EVP/SVP	\$	315	\$	316	58.9%	61.3%
VP	\$	269	\$	270	67.1%	70.3%
Account Manager	\$	224	\$	248	77.3%	77.7%
Senior Account Executives	\$	185	\$	188	85.0%	84.3%
Account Executives	\$	155	\$	156	89.0%	89.0%
Account Coordinators	\$	117	\$	117	84.8%	81.7%
Blended Rate	\$	197	\$	190	—	—

Source: Gould+Partners

FINDING CANDIDATE AGENCIES

- Not easy!
- 2-step process:
 - Request For Qualifications (RFQ) – casts a wide net (15-20)
 - Request For Proposals (RFP) – zeroes in on the best candidates (6-8)



RFP ELEMENTS

- Overview of organization
- Explanation
- Department structure
- Scope of work
- Budget
- Agency selection criteria
- Submission requirements
- Process timeline



FIELDING A TEAM . . . AND KEEPING SCORE

- Committed and involved evaluation team is essential
- Well-written RFP = well produced scorecard
- Ensures structured review among team members
- Focuses on what's measurable
- Recognizes the intangible – aka chemistry



Sample Scorecards

Candidate Public Relations Agency Proposal Evaluation Name of Agency: _____ Scoring: 1=Poor; 2=Unsatisfactory; 3=Average; 4=Good; 5=Outstanding	Finalist Public Relations Agency Presentation Evaluation Name of Agency: _____ Today's date, 2015 - Time Scoring: 1=Poor; 2=Unsatisfactory; 3=Average; 4=Good; 5=Outstanding
Criterion	Criterion
Demonstrated understanding of client business, markets, marketing issues	Overall philosophy, approach to public relations
Overall approach and philosophy to communications – agency's "point of view"	Understanding of client situation/questions asked of client
Recommended communications strategy	Ideas on situation X, approach
Overall communications mix and methods (tactics, programs, approach)	Ideas about X scope, approach
Approach and recommendations on X issue	International understanding, approach
Approach and recommendations on scope of X	Clarity of structure, administration, budget
Approach and recommendations on international support	Members of account team
Proposed account structure and management, including agency personnel	Agency capabilities, relevant experience
Agency background, capabilities, case histories, relevant client experience, references	Answers to client questions overall
Budget Explanation	Response to client's "challenge"
Other: _____	Overall chemistry, fit with client
Overall Impressions of proposal	
TOTAL SCORE	TOTAL SCORE

SELECT FINALISTS – PRESENTATIONS

- Choose 3-5 finalists
- Allow 2-3 weeks
- Presentation ≠ proposal
- Create final challenge/seek clarifications
- Deep dive into cultural fit/chemistry



ANNOUNCE RESULTS

- Inform all at once
- Provide those not selected with feedback
- Notify interested internal parties
- Negotiate contract
- Establish date of first meeting
- Public announcement – at your discretion

A SUCCESSFUL PARTNERSHIP



- Make the firm part of your team
- 3-month review
- Review invoices
- Make adjustments early
- Celebrate the successes!

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Thank You

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