

WHITE PAPER

The RFP: Make It a Win-Win

How to craft a request for proposal that entices the best candidates

by JANE PELLICCIOTTO

The RFP (Request for Proposal) signals opportunity for a creative agency! They've made it onto your list of qualified firms. You'll have plenty of work samples, project fees and approaches to choose from. On the surface this sounds like a win-win for both parties.

Not really.

Many creative firms see nothing but days lost reading a 35-page RFP and throwing their hat into a huge pool with little chance of winning.

If the process seems to favor you the client, it's because you create the RFP and choose who gets the project. But there are real costs that aren't always obvious. Even the best-run RFP process has built-in flaws and costs.

Built-in Flaws

Anonymity. Most RFPs don't encourage or include pre-proposal, face-to-face meetings or speaking on the phone. The process is typically anonymous. You and the winning firm are stuck with one another. If there isn't a good connection, the work can suffer. Misunderstandings occur even in the best relationships, but it's much harder to navigate problems with someone you've never met.

Too little scope vs. too much — a catch-22. For you to compare apples-to-apples proposals effectively, the scope of the work has to be very specific. In an ideal world, you make clear what you're hoping to achieve, and the right firm figures out the best way to get there. It's a bit of a chicken and egg problem. When multiple firms are bidding, cost estimates have to reflect a tightly-defined scope. This closes the door to possible better outcomes before the process even begins.

Proposals are best presented than read. A good proposal, it could be argued, should speak for itself. But a proposal is really just a suggestion. Most RFPs lack the kind of information that make good proposal writing easy. Most firms would welcome the opportunity to clarify their proposal and answer questions in person.

Little repeat work. Organizations that most often use RFPs are bound by procurement rules that don't allow working with the same firm again. Good creative firms know that the best work occurs where the trust and comfort level is high and where communication flows easily.

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Costs, and How to Avoid Them

The typical RFP process is filled with non-monetary costs. Not counting them can lead to bad decisionmaking. There are three major costs: staff time, effectiveness and loss of goodwill.

Your staff time. The proposal process can consume too much staff's time better spent on activities such as studying your audience and setting goals, not to mention managing the project once a firm is selected.

» Cut your staff time by pre-selecting fewer, more appropriate firms to bid. You can start with a larger pool and narrow them down through quick, in-person meetings. It's tempting to believe more is better. It usually is not. You'll feel more confident in the proposers and they'll be more committed and enthusiastic.

» Write the best RFP that will elicit the best proposals. Keep it as short as possible. Eliminate burdensome legalese not fitting to the type of work you're seeking. The shorter and clearer the RFP, the less time your staff will spend fielding questions. The better the proposals will be. The project starts sooner. Win-win!

Effectiveness. RFPs often emphasize the what (brochure, website, poster), budgets and deadlines. And less about what you're trying to *achieve*. This mindset can lead to less effective work. While budgets and deadlines are valid concerns, it's a good idea to think more in terms of the *value* you're hoping to receive. This takes the focus off budget and puts it on something much more important.

Loss of goodwill. Some prospective firms suspect RFPs are a way to either fish for prices or else simply conform to procurement requirements, while already having in mind a firm to hire. One red flag is refusal to disclose a budget. Honest brokers use budgets, not to bid up to, but rather to assess whether the project is a good fit. Have confidence that you will be able to assess cost, talent and experience when you have the proposals in front of you.

You have limited resources and time.

You want your organization to be as effective as it can be.

Make the RFP process a win-win for everyone involved.



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Good, Fast, Cheap: Pick Two

Or, How to avoid getting stuck with schlock

by JANE PELLICCIOTTO

Google the phrase “Good Fast Cheap Pick Two” and you get over 600 million search results. Many such requests appear in venues like LinkedIn. Is it the economy? Is there a growing sense of entitlement? Or is it more benign than that—businesses don’t realize that a request for good, fast *and* cheap are not useful descriptors in seeking, and getting, what they really need?

To ask for and receive all three is mostly a fantasy. Even two is a stretch. But many businesses, especially nonprofits, often find themselves hard pressed to eliminate two of the three. You wouldn’t buy a car, build a bridge, hire an electrician or find a mate with these three criteria.

Let’s break these down so we can understand the impact of each scenario.

When you can only pick two

Fast and Cheap. Quality is likely to suffer in the form of creative output, research time, accuracy, and ability to test and consider options. Make sure you are comfortable accepting some or all these drawbacks. If a designer does agree to work under these circumstances, avoid surprises by making sure you understand the drawbacks. Visual examples help a designer understand your expectations. Getting on the same page quickly is imperative for “fast,” as there’s no time to waste. Also, define “cheap.”

Good and Fast. To achieve these two, expect extra time beyond normal work hours and a possible rush fee for both the designer and any other vendors such as printing companies.

Good and Cheap. A designer or printing company might lower their rate for an organization in need of services beyond their budget. The designer might agree to do the work pro bono, if it benefits them in some way. But to do good work *and* keep costs down, the designer will have to put full-fee projects first.

*Be wary of those who agree too quickly to your good, fast and cheap project.
Plan to properly vet any firm, even if it becomes a pro bono project.*

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Define good

Your good is my great and someone else's mediocre. Figure out how to define what *good* means to you. Share printed samples or website links with the creative team. Be specific about what you like. Use meaningful, universal, descriptive words to paint the right picture for the other party. Starting off as one mind will save time and money.

Plan to your advantage

We need *fast* when we don't plan, or we're caught off guard by an opportunity we want to seize. Many creatives will bend over backwards to help out a client in a pinch. And while no one loves transferring their lack of planning to another party (and emergencies do arise), poor planning should be the exception, not the rule.

Use one of your own recent endeavors (an article, press release, proposal, business plan) as a rough indicator of how much time you need to factor in. Most of us are idealistic and unaware of how much time we spend on tasks. If a designer, writer or web developer does bail you out, reward them in the form of patience, money, loyalty, appreciation, creative freedom or a great referral.

Have a budget

Everyone wants affordable, no matter the size of the budget, which is why the word *affordable* is meaningless when seeking a creative firm.

First, it advertises that cost alone is more important than quality and effectiveness. Second, the desperate creatives come running and the good ones retreat.

Some clients say, "I need this. How much will it cost?" Instead, say, "This is how much I have to spend. What can we do with that?" The desire for cheap without definition leaves you too vulnerable to a mishap. Better to focus on *value*—the specific benefit you receive at the specific price you pay.

The more well defined and specific these limitations, the more likely you'll end up with a timely and cost-effective end product whose quality you are happy with.

Your organization deserves the best it can get with the resources available.



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Is Yours a Whole-story Brand?

A brand is like a story. An effective brand is like a great story that leaves you satisfied and complete — even if you have to interpret the ending.

There are characters (your product or service), a plot or over-riding theme (your essence, reason for being, your WHY), the tone or style of the prose (your brand's unique voice and personality). There is *who* the story is trying to reach (your ideal audience). And the many functional aspects like the structure of the story, its sentences, and the visual design of the text and covers (your identity, your marketing pieces, your website).

There is one more aspect — the thoughts and feelings imposed on the story by the reader (the outside perception of your brand).

A novel's compact and unassuming stature barely betrays the work that goes into making it an enjoyable, meaningful experience that connects with the reader and makes them hunger for more. The same is true for a brand. But unlike a novel, a brand has many touchpoints and places of entry. Because of this, all parts have to function together in support of one another. In short, it should be cohesive.

A cohesive brand is a powerful one.

- » It is **relevant** in the life of your target audience. It fills a need, a desire, supports common values.
- » It is **understanding** because it makes a connection in some important way.
- » It is unique or **distinct** in a way that sets it apart from the competition.
- » It is **popular**, not among everyone, but those who matter most—the target audience.
- » It is **high-quality** in its category, in how it looks, performs, behaves, communicates.

When all visual and verbal messaging is in sync and matches the high quality of your product or service at each point (in person, online, tangible products, etc.), that's when the story lives large in the hearts and minds of the people who matter most.

How do you know if your brand isn't whole?

Your brand assets aren't in sync with one another. This could be anything from excellent phone and email communication but a website that contradicts it verbally, visually or structurally (or all three). Or, vice versa, you have a beautiful, functional website with repeat visitors but in-person communication leaves something to be desired or doesn't match the quality of the product or service.

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Customers can't find or understand you well enough. The message is unclear, unfocused or not differentiated enough to stand out from the competition. Or your outreach efforts are not meeting people where they are. Often, businesses and organizations try to appeal to too diverse an audience, risking that the people who matter most can't find you.

You put features and credentials before benefits. People want to see themselves in your product or service. You have to connect the dots between what you do and how it will improve their situation. What's obvious to you isn't to them. There is a place for "what we do" features, but most people want to know what's in it for them. How do you really make lives better? Spell it out.

You don't have the right tools or systems in place that allow you to shout your brand from the rooftops clearly and consistently. This leaves you vulnerable and unable to seize opportunities that arise. You spend more time crafting marketing messages or materials on the fly. This leads to holes in your story and missed opportunities to capture the positive attention of your audience.

You have parts of the brand that work, like an identity and marketing materials. But the voice (personality, tone) of your story is out of sync with or not enhancing the visual message, or even the unique character of your product or service. The opposite can also be true—you put effort into crafting the key messages but the visual brand is flat, confusing, dated or cluttered.

The story of your brand is unique and deserves to capture a solid place in the hearts and minds of your audience.

Make sure the whole is as captivating as its individual parts.



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