



RFP: Request for People

Finding the Right Fit in a Communications Partner

By Kathy Cain



Your institution is ramping up communications, gearing up for a new admissions campaign or Web site redesign, and is looking for an outside firm to help develop and launch the project.

Institutions traditionally seek outside services by sending out a Request for Proposal (RFP), aiming to acquire that service in the quickest and least expensive way possible.

This competitive bidding process works perfectly well when seeking products or widgets, but when it comes to strategic and creative services, the information solicited by an RFP is sorely lacking. In addition, the process can be overly time-consuming for both you and prospective firms, and does not allow you to really “get to know” the company—and vice versa—until the project is underway.

The solution? Consider a Request for Qualifications (RFQ) instead.

The goal of an RFQ is to find interested firms and determine which firms may be a good fit, suitable enough to take the next step.

A communications partnership is not a commodity. You can't price strategy and creativity like you price reams of paper or desk chairs.

WHY NOT AN RFP?

A communications partnership is not a commodity. You can't price strategy and creativity like you price reams of paper or desk chairs. The creative team that you work with should be seen as an extension of your team, like another employee. And as with the employee hiring process, relationship is as important as talent. So, the search process is about finding a good match that goes beyond a checklist of deliverables.

Your goal should be to find a communications partner that will be a good fit, one that understands your vision and what you aim to achieve through your communication campaign. The goal of the communications firm is to find a client that is also a good fit, with whom a long-term partnership (not just a single project) would be the best match for its staff and experience.

With an RFP, the approach is often based on that checklist—a rigid request for deliverables. The RFP then represents the firm mainly in terms of tools and execution, making it difficult for you to assess the culture and capabilities of a potential partner. Perhaps the firm can create that 25-page annual report for a good price, but will the firm be easy to work with? Does the firm understand the ideas and the vision behind the numbers in that annual report?



The RFP can be limiting for potential firms as well. Without knowing your situation, background and in-house staffing and skillsets, estimating work can be a challenge. Or, the RFP process can devolve into a glorified estimate that benefits the institution but puts a strain on the prospective firm. The recommendations, plans, schedules, calculated costs, and creative work that a firm submits with an RFP are all done on company time, with no guarantee that the time invested will result in paid work. Because of the costs involved, including travel costs that are often incurred as institutions ask all applicants to present in person, this process can deter your best-fit partner from submitting a proposal and working with your institution.

In addition to costs constraints, there can also be time pressure. Some RFPs, in part due to poor planning, arrive with a proposal deadline that leaves very little time for preparation. This need for a quick turnaround assumes that good firms are not busy, and again may dissuade a potential partner from submitting a proposal.

The institution may also find itself in a crunch with the RFP process. Many institutions send out RFPs without doing any sort of pre-screening or internal planning. Any firm can then submit a proposal, and you may end up spending time you don't have going through dozens of submissions and talking with dozens of firms that may end up lacking in chemistry.

THE REQUEST FOR QUALIFICATIONS

The RFQ saves time and effort and can lead to an all-around stronger and more successful creative partnership. By choosing to send out an RFQ, you can choose a firm based on talent, past results for similar clients and the potential relationship. By focusing on the firms' people rather than solely on its ability to estimate tasks for a possible project, you can choose among firms that more clearly understand your situation, landscape and the partnership that it will take to get things done.

By focusing on philosophy and working style in the RFQ rather than specific budget items in an RFP, the prospective firm can better present its services, style, and method. It is difficult for a firm to develop a budget for a project without going through the process of exploring issues, strategy and potential solutions with the client.

SO HOW DO YOU WRITE AN RFQ?

PREPARATIONS:

To ensure that you have time to prepare and review possible communication firms, and that potential partners have enough time to prepare a response, we recommend starting the process about six months out. Begin by defining your institution, identifying your ideal communications partner, and narrowing the field of prospective firms. In this way you will be prepared to focus finding a good match.



Your Institution

Before you begin the search for a communications partner, you should have a clearly-defined profile of your institutional situation—your mission, the scope of the project, your marketing vision, and your goals. It is important to identify the culture of your institution and how your institution defines success. Including these elements in the RFQ will give prospective partners an idea of who you are and whether they would be a good fit.

Also determine what kind of consensus-building will need to be required for the selection of the firm as well as later on, when the project starts.

- Will you need to go through a formal, in-person process with committees?
- Or will conference calls and Web presentations suffice until a final, in-person visit?

Work out the details of the approval process so you have milestones, checkpoints, and a point person to guide the process. Identify the roles of your team members and assign a point person, so the firm can deal with consistent directions throughout the process. Having these details prepared at the beginning of the process gives you more time to focus on selecting a firm that fits your vision.

Your Ideal Partner

Create a profile of your ideal communications partner. Consider style, method, cost, reputation, range of services, and experience. What is most important to your institution and to the staff working on the project? A prospective firm could demonstrate the ability to perform every task in an RFP but end up having an approach or style that turns out to be at odds with your institution's vision. By determining who you want to work with—what firm would best suit the communications goals of your institution—you will be able to confidently select a partner firm.

Narrowing the Field

Limiting your focus before you even send out an RFQ will increase the likelihood that you get responses from firms closely aligned with your ideals and goals. If you do a Web search for “communications firms” and send your RFQ to everyone on the list, you may end up with dozens of responses from firms you've never heard of, making the process of narrowing the field to a handful of worthy candidates much more time-consuming. Solicit recommendations from colleagues, listserve, and professional groups such as UCDA, NACAC, NAGAP, AACSB, GMAC, CASE, EduStyle, and UWebD. Browse projects and/or Web sites from other institutions—if you like the look or the results of the work, find out what firm was involved. An extra recommended step is to send an email to your list of firms before sending out the document. Then, after an introductory call to interested firms, send out the formal RFQ.

Create a partner profile

By determining who you want to work with—what firm would best suit the communications goals of your institution—you will be able to confidently select a partner firm.



WRITING THE RFQ

An RFQ is far simpler than an RFP, but produces responses that can lead to a far more successful partnership. Remember—the search for a communications partner should be approached like a search for another team member: you should not view applicants as budget items or as a way to get free advice. Keeping that in mind, you should not ask for creative or strategic spec work, for a prospective firm to set your budget, or for the firm to visit you before you are serious about them. Instead, ask for the firm’s philosophy, scope of services, personnel, and qualifications.

An RFQ is far simpler than an RFP, but produces responses that can lead to a far more successful partnership.

WHAT GOES INTO THE RFQ?

YOUR PROFILE

- Introduce your institution.
- Discuss your current situation: What has the institution achieved thus far? What is the institution’s mission? What role does marketing play in the institution’s overall vision? What are the goals of your marketing campaign?
- Include a preliminary vision of the work you will need from a partner firm: What services are you seeking? What does the institution hope to achieve with a new marketing campaign?
- Internal staffing: Who is the point person? What other communications people will be working on the campaign? What other institution staff, such as IT, is available to support marketing initiatives?

SPECIFICS

- Anticipated timeline: Include when the RFQ responses are due, the short list selection date, interview dates, final selection date, project start date, and projected campaign launch date.
- Contact policy: Who should the firm contact with questions? To whom should the firm mail submissions? Who will make the final decision?
- Submission format: Specify electronic, bound, etc.

THE FIRM

- Request a statement of interest that includes the firm’s background, philosophy, approach, scope of services, and qualifications specific to the project.
- Ask for case studies that demonstrate previous experience with similar projects, references with contact information, and a client list.



- Request brief bios of all staff that will be involved with the project, including individual experience with similar projects. Be sure to ask the firm to specify the staff member who would be primary contact on the project. Ask what it is like to work with them.
- Ask for a description of the firm's project management process and how projects are estimated.

NEXT STEPS

Schedule an introductory call with interested firms before asking for the formal response. This step will help pare down your choices and may even alert you to firms with which there is no immediate chemistry.

After the RFQ goes out and you receive responses from all interested firms, review and choose two to three finalists. In choosing finalists, focus on whether the firm has experience in your niche and experience with similar challenges and situations.

- Assess the staffing situation—will it be complementary or duplicative?
- Does the firm seem like a group of people you would enjoy working with?
- How accessible will the key creative staff be?
- Review past campaigns and case studies—did the firm achieve results?
- Did the firm remain with the institution after the initial project?

Call references to hear from other clients about what the firm is like to work with.

You can get a better idea of the firm's culture and approach by visiting them, meeting their entire staff, and seeing their native habitat.

After investigating the final candidates thoroughly, schedule follow-up calls to address any questions or concerns and to talk about pricing and scheduling. At this point you can define a scope of work for a first project (probably strategic) and provide some budget ballparks.

If possible, visit the firm. Rather than making the firm come to you, as in the traditional RFP process, you can get a better idea of the firm's culture and approach by visiting them, meeting their entire staff, and seeing their native habitat.

Since you have gone through the RFQ process and selected finalists based on goals and qualifications, you are probably left with some very good firms from which to choose.

It could be a difficult decision, but you will be confident that your selection will result in a strong working relationship with your new communications partner.

Zehno has worked with many schools and programs to help effectively plan and produce communications campaigns that work in today's world. To learn more, call 1-800-860-1079 or write to info@zehno.com.