



# A Guide to Writing a Successful RFP Response

Ebook



Hello, and thank you for downloading the latest ebook.

We're a sales intelligence company who aim to deliver vital information for businesses looking to increase their pipelines with tailored, relevant and high quality leads. We've worked with some of the biggest companies in the world and understand the challenges associated with not only lead generation, but converting those leads into pitch opportunities and, ultimately, new business through the door on either one-off or long-term contracts.

That is why we've put our heads together and compiled this particular ebook, which is designed to help you structure your RFP response in such a way that your prospects simply have to take note of you and invite you into the boardroom to pitch for the work.



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## What is an RFP?

There are a number of different ways in which you can come across new business opportunities ranging from cold-calling and social media connections to conferences and networking events, but RFPs are arguably the most common format in which you can identify growth opportunities.

To put it simply, RFP stands for Request for Proposal. This is a document compiled by a business that lists all the needs and requirements for a new project, and they then ask interested parties to put together a proposition explaining how they would deliver what the business is looking for.

It helps the vendor company to prepare for those upcoming projects by inviting interested parties in for a meeting and to pitch for the work to company decision makers, enabling them to see how those services will be delivered and what it might cost them in order to employ their services.

## So now we've explained what an RFP is, let's get down to business...Why is writing an RFP response so difficult?

Compiling a response to an RFP is more difficult than many would have you believe, especially when you consider that this may be your first engagement with a prospect and potential client, and first impressions count.

Not only do you need to make a good impression, you also need to impress them to the extent where your RFP response results in a brief or opportunity to go into the boardroom and pitch. It's vitally important that you get it right and this comes with a lot of pressure, especially from members of the management or C-Suite, even if they aren't directly expressing their feelings, but why is writing a response so difficult sometimes?

### There are five common explanations:

Often a complex process.

RFPs are frequently searched and this means that you are likely to be up against a number of competitors all vying for the same opportunity or foot in the door. This means you can't simply write an expression of interest, you need to think of it as though you're pitching to pitch, and this can be difficult with often little to work with at this stage.

They are designed to be fair to all bidders.

As public tenders are published in the public domain they have to be much fairer than other pitch processes. They require a much more transparent approach and that means you need to be completely upfront with what you can offer and how you differ to other businesses, even potentially giving away key details such as your pricing or processes. The reason why they need to be fair is because it is a public application process and everyone from small independent agencies up to multinational companies have the ability to throw their names into the hat.

Company analysis is required.

Both into your own business and the business putting the work out for tender. You always want to understand exactly where you both stand in your industries so that you both know the size and experience of the business you would be working with. After all, a major multi-national is highly unlikely to accept an offer from a two-person startup, and likewise a multi-national agency is unlikely to pitch for work with a two-person startup. When looking at the other business, consider things such as:

- Turnover: are they in a position to award - and pay for - the work
- Experience of your company and employees: experience is vital and buyers usually ask for 3 relevant case studies as proof of not just the quality of your work, but the campaigns you have worked on, and who with. Our recommendation would be that if you do not have this kind of experience then it probably is not worth you putting yourself forward.
- The short and long-term goals of their business: where do they want to be, where are they, is it realistic, will it reflect on you if they don't get there.
- The work you would need to do in order to help deliver on those goals: is it tangible, can it be done in the timeframes, do you have the experience, resource and skill sets to get there.

Don't apply for anything worth more than 50% of your annual turnover.

You should never put all your eggs in one basket, and if it's costing you more to do the work in terms of hours and resources, it's not a financially viable project. Not only that, if you do under-perform it will affect your future prospects both financially and in terms of your professional reputation.

A lot of RFPs come with long documentation

Take your time to thoroughly understand the brief and the specification, and don't just think about whether you can deliver the work - but also if you actually want to. At this stage it is also worth thinking about how competitively you can price the work as most public sector tenders will split their evaluations into quality and cost. Sometimes tenders will deliberately opt against listing the price of the contract or their overall budget for the work so that suppliers become competitive rather than pitching as much as they can within the budget, so be as competitive as you can.

## The things prospects look for in an RFP response

Now you understand why it can be difficult for some to put together an RFP response, it's important that you understand the types of things that prospects look for in a reply.

Having put out the request for proposals they're likely to be inundated with interested parties getting in touch to express their interest based purely on the name of the brand or the potential value of the project. What is most important, however, is that you ensure that you tick all of the boxes in terms of what they often look for, as this often influences who gets the full brief or an invitation to pitch.

### This includes:

#### Compliance

Prospects will always search for compliance in the proposals they receive. Have the applicants done what was asked of them? Are they qualified to the level requested and have they provided case studies to prove it? As the applicant, meeting this level of detail is not a difficult thing to do, provided that you follow the instructions and it says a lot about your company if you fail to meet all of the requirements at this stage, so be sure you do so otherwise all that hard work is wasted.

#### Evaluation and scoring

This stage can be gruelling for companies who have put work out to tender and the chances are that they will take one of a couple of approaches to do it to be as efficient and fair as possible on applicants. Creating a scoring system is often the fairest way of deciding between the numerous applicants and these proposals will be evaluated on factors including the level of experience, value for money, the quality and depth of the initial response and even their geographical location to make face-to-face meetings easier.



### Individual assessments

This is where all of the assessors will have a good idea of what a good proposal for the relevant project looks like and then they go away and assess proposals and then a meeting is set up where they discuss the pros and cons of each applicant and argue for and against each proposal. Different people will have different opinions on certain applications, so different views are often important in deciding between two evenly matched proposals.

### Share and score

In this way the same person from the company will be given the responsibility for a particular section of all of the proposals. The proposals would be ranked in order of best to worst for that specific section based on the evaluation and scoring system. Then the team will come back together and compare all the rankings and see who comes out on top. This is a point that highlights that every single section of your response matters and is important.

### Multiple eyes

This is just where everyone looks at everything, usually if the responses have been whittled down to a small number. RFPs have a bit of a bad reputation for being tricky and there is often a lot of work that goes into a response or proposal that may not make it to pitch, but they are very lucrative if won.

## Things to consider before you apply for a tender

You've done your background research into the opportunity and have decided that this might be a good fit for you and your business. Now what? Do you just start writing your response, or even reaching out directly to the prospect to form a relationship?

Before you get down to business it's important that you go over a few key details as a business before you start your application, as this additional information could prove vital. You might find that you can't do the work for the budget, or maybe it's not right for you after all. Whatever the outcome, it's imperative that you consider a few points before you start your application:

## Read and understand the RFP

You have no hope in doing well if you don't understand the RFP properly, so make sure you study it in detail. For the most part, RFPs tend to contain a combination of the same six sections:

- An introduction to the opportunity and to the client
- A description of the response process and how they would like it structuring
- A description of the work expected
- Contract terms and conditions
- Response instructions
- The evaluation process and criteria

Keeping these sections in mind will help you remain structured and focussed when creating your response.

It's worth remembering that not all RFPs are written well, and even those that are can often be difficult to understand due to the use of specific industry terminology or abbreviations that the prospect may have used,, so take your time to learn what it all means so that - when asked - you can explain clearly or concisely. Similarly, the prospect may have advertised a number of key criteria that they are looking for using abbreviations and industry-specific language, and you need to read up on these to ensure that you understand what they are looking for and how you can deliver it.

Usually there is an official question period relating to an RFP, so be sure to use it. Make sure you ask every single question you need the answer to in order to be able to respond to the proposal in the best way possible. However, it is useful to be aware that sometimes the questions asked on an RFP are made public so your competition might be able to see the questions and also the answers - so try to word them in a way that gives nothing away. While this might affect your (and your their) proposal, it does give you a chance to speak with the prospect and show your willingness to ask and learn in order to compile the best possible presentation.

A lot of people fail at this stage in the process because they don't respond to all of the requirements or they clearly haven't understood them. There is no point investing time and resource into an RFP response only to fall at the first hurdle with the prospect discarding your response immediately after finding you've missed the point of their RFP.

## Pay attention to the evaluation criteria

Typically, a prospect will state what the evaluation criteria is in an RFP so that each applicant knows how they will be scored and what the most important considerations are.

For example, they might tell you that 10% of the assessment will be based on pricing and 50% is on past, relevant experience, so you know where to prioritise your efforts and work. It seems simple, but is often overlooked.

Focus on the sections that provide the scores; the greatest weight of scoring should be your top priority. This also helps you work out if you are the right fit for the work and if it is worth your time applying. So, for example, if your pricing is one of your key selling points, but is only given 10% weighting in the evaluation criteria and you don't have that much relevant experience, which is given 50%, then it might be that you decide it is not a good fit for you and not worth the resource and effort required for writing a proposal.

## Figure out your price

In a lot of cases, especially with government RFPs, pricing is important and there is a common belief that the lowest price wins. This is not always true. Pricing your work too low can be a red flag in the respect that you perhaps don't understand the scope of the project, or may be willing to drop to such a low price just to get some work that you're not the professional, high-performing outfit that the business wants to work with.

Make sure you base your quote on reliable information, not guesswork or assumptions. If you are going to suggest or pitch additional options, make sure you make it perfectly clear that this is what they are, and not a big price tag for the basics of the project. Sometimes, depending on the client, it might be worth costing a little bit lower than you might usually, if it is the case that you think there is a long term relationship to be built - but do not make it too low that it seems unrealistic to the client.

Of course, if it is not a government body then being the cheapest isn't as important as long as you can sell the value of using your business opposed to competitors, and this is where you really will rely on your case studies and industry experience rather than your price structure.

## Additional background research

The more you know about the client outside of the information you have been provided with in the RFP, the better. Use the internet and any resources available to you to do your research as every piece of revision counts. You wouldn't prepare for an exam by only reading up on key topics and headline events, you'd look into the background, and the same is true here.

Have they been in the news lately? Are their annual reports accessible online? If you can learn as much about them as possible then it helps you understand where the RFP fits into their wider strategy, and it will help add context to your proposal. You can also establish whether or not they've not told you about key events in the business that may deter you from applying to work with them.

From the RFP you know their immediate, short term plans but can you work out what their longer term goals are? If so, play on this and tailor your proposal accordingly by meeting their immediate requirements and elaborating on how this can lead to future campaigns and opportunities if they work with you.

## Is this really the right project for you?

Once you have taken the time to understand the scope, the pricing and the evaluation process you can make an informed decision as to whether or not it is worth you applying.

Remember, an RFP application takes time and effort so don't give it half of your attention as you're not only unlikely to win but it could harm your reputation if you do so as your application will come across as unprofessional.

Everyone else will be going all out, so you need to, too. If you decide it is a goer then you need to make a plan. We recommend breaking down each section of the RFP, thinking about how you want to respond to each section and what you want it to look like - and also which experts in your business you want to have contributing to each area. You might have a new business team in-house, but that doesn't mean they know the industry you work in inside out like those working in it every day.

Also, think about how much time you think each section will take, so you can plan your team's time efficiently. Remember to add some bonus time for contingencies and make sure you do a real time log so that you can learn how to estimate timings more effectively for the next proposal that you do.

## Get clear on why you are the best choice

It is all about value, but what value and benefits can you offer? Why should the client choose you, as opposed to another company similar to yours? Do you have a super experienced team? Do you have loads of experience? Do you have enough resources to dedicate a team specifically to the work? Are you local?

Whatever your upper hand is, use it. Make it specific to this project, not your general USPs but the things about YOU and the way YOU work that make you the best fit for THIS specific project. You can provide case studies that showcase your previous work and these may include examples from similar projects and industries, but you cannot simply copy and paste a previous proposal for a competitor or business in the same industry.

*You HAVE to make this specific to THIS opportunity.*

# How to shape your response



## Introduction to this section. "The 5 Be's".

So you've found a tender and after looking through it with a fine tooth comb you've decided that it's right for you. Now how do you start to shape your response?

Before you start working on it you want to establish how your response is going to be structured. You need to come across as professional and the best option for them to work with, but it's important that you come across the right way in your response and not as a "know-it-all" or "big time" business - it's a long way to fall if you get it wrong!



## We like to talk about The 5 Be's when shaping an RFP response, as this helps you to get the tone, content and style of your response just right.



**Be assertive.** Make it clear that you are confident in your ability to service the tender. Use confident and assertive language such as 'we will' as opposed to 'we can' or 'we could.' This makes you seem competent as a supplier and explains the process that will be implemented, not what might be if certain things fall your way..



**Be concise.** Remember the buyer will be reading through a number of responses so make yours succinct and directly relate it back to the specification provided to you. They will be ready to remove any that don't meet the requirements, so ensure that you cover each and every point that you've been given.



**Be thorough.** A bit like an exam where you're asked to use a certain number of words and are marked down if you don't get close, or go over, fill the space and utilise the word count. If you have been given a longer word allocation for a certain question, it means they want to know more on this point so make sure you provide the detail. Take their lead here. Ensure it is rich in detail though, and that you are not just waffling.



**Be scrutinous.** Proof proof proof. Spelling or grammatical errors always look bad in an application, as do simple mistakes like incorrect page numbers in your contents or poorly formatted pages. Even inconsistencies in terms of the fonts and sizes used can stand out like a sore thumb, so take a consistent style throughout and be sure to have more than one person proof it.



**Be aware of key stakeholders.** You need to identify who within your business are the key stakeholders for the relevant project. You wouldn't have your finance manager writing a proposal for a design and development project for example.

You should have the person within the business who is most experienced in said area writing the proposal, to make sure that this expertise filters through. This person also needs to know the whole scope of the project and be fully immersed in the project (they can't dip in and out), so they need to be given complete management and decision making power. It's then best to have them involved in the final delivery, too, rather than utilising their expertise and attempting to paraphrase or even answer questions that your pitch team just can't answer. You have experts in your team for a reason!

# How to start your RFP response



Now we've reached the business end. You've done all of your background research, you've read up on The 5 Be's, you've got a team in place and you're ready to start putting together your RFP response.

The best thing that you can do is have someone create an outline before you start writing. Use the sections that are included in the RFP and make sure your outline matches this so you can cross reference, but then your outline will need to include subheadings and also bullet points as well to keep you focussed when writing.

Start wherever you feel most natural and remember that this is not your final draft, so allow yourself time to write something that may not be pitch-perfect to start off with, just to get words on the page that you can then work with or expand on with more detailed analysis.

Although the order in which you write your proposal doesn't matter, the order in which you submit it does. So make sure you are following the instructions that you have been given in the RFP when it comes to this.

If there is no suggested order then the best approach is to make sure that you follow the order of the RFP. You should then number the pages so people can jump to applicable sections easily, and make sure you keep to word counts too. If it didn't matter, they wouldn't have included it!

So, let's start writing this winning RFP response shall we?

### Executive summary

If you are required to write an executive summary - do not underestimate how important it is. Some reviewers will decide whether or not to continue reading your proposal based on this, so it is a big deal to get it right.

Experts suggest you should give a summary of the benefits or the value of choosing them as a supplier within your executive summary which outlines the content of your response and provides a top-line view of who you are, what you would do to meet their needs and the potential outcomes.

A fairly good rule of thumb is that an executive summary should be 5-10% of the length of the entire proposal. It needs to be persuasive, not too detailed but not too brief, either. This is an opportunity to impress and get to the point, without giving away the next 20 pages of hard, persuasive work.

One thing that will work in your favour is matching the client's language in your executive summary. Talk about their needs, their requirements, their goals, their challenges and how YOU can help them, as well as how they will benefit if they choose to use you as a supplier. If you speak in their language it is like you are talking to them personally, not business to business, and it shows that you understand their business and terminology.

From reading your executive summary you want the client to feel heard and understood. Why should they continue and read the whole proposal when they've got 10 others to go through if they feel like you haven't understood the brief, or taken the time to learn about what they need?

### Providing evidence that you are the best

When you are at the stage of writing you should have this so clear in your head that you can get going right away.

Use the most recent examples or case studies that you have. If you don't have a recent one that's fine, but don't draw attention to the date of it. The reviewer will be looking for reasons NOT to use you at this stage, as opposed to reasons to use you, so if there is something in your case study that isn't quite right for this experience, then don't draw attention to it.

If you can use case studies and testimonials then this is ideal, provided that it is relevant to the request. Don't just throw any old case study in there! This social proof will help them paint a picture of who you are as a business and the (positive) differences you have made to your clients. Showing general benefits are better than nothing, but specific ones are better for sure.

Take pride in your appearance. It matters!

Appearance is obviously more important to some people, than others - think about videographers, graphic designers, and web developers. But even to those clients who are not in such specific visual industries, the way your response looks is important.

It needs to be well organised, look good, have good visuals and be consistently amazing throughout. Think of your proposal as a job interview - it needs to look good, come across well and show these people that you're the ideal candidate.

A completely wordy application is great for providing detail, but there are ways that you can structure the proposal to be more pleasing on the eye. It's a well-known view that blocks of text can be monotonous and some don't respond as well to page after page of text, so an idea of some aspects that can be used to create visual variety include:

- Bulleted lists
- Charts and graphs
- Tables
- Headings
- Logos
- Team photos
- Icons
- Call out boxes

At the same time, you don't want to make it an art project. You need to show your worth and qualities, and these visuals should aid your proposal - not take anything away from it. Using them to emphasise key areas or visualise an approach can be incredibly useful.

Answer the questions, be clear and don't skimp on the details

Non compliant RFP responses that do not answer the brief are incredibly common. Not only do you need to answer all of the questions but you also need to make sure you make it clear that you understand what is required and that you know how to deliver on that. You need to make it as easy as possible for the reviewer to grade you, and grade you well!

If you are suggesting in your RFP that you want to offer more than the scope that they have set out then make sure that you make that clear, so they don't think that you have just got it wrong or misjudged it. If your objective is to show what a long-term solution would look like, ensure that you show what the short-term solution is, too, if that's what they're looking for.

Do not lie and do not exaggerate. This is not the way to win an RFP. This is an opportunity to be transparent about who you are and what you do, whilst showcasing the value you can add to the project.

Finally, make sure you go into detail. Don't just talk about what you will do, but also how and why you will do it, along with the potential outcomes. Also, focus on when these things will be delivered and when they can start to expect to see results. You could promise the earth, but if it takes ten years to get there it's not the project for them. The RFP will have set out the short and long-term goals, as we've already mentioned, and they're going to expect these deadlines to be met.

## Reviewing and editing your content

Once you have a full draft, the editing part is really important. Make sure you move content around if needs be so that the proposal flows. Something you wrote for one section might actually work better in a different one once the whole thing has been written.

Nothing less than 100% compliance is good enough so you really need to make sure you have thoroughly covered everything. In simple terms, if you forget to submit one mandatory item then you may as well not have bothered at all and all of your time and hard work has been wasted.

Don't fall into the trap of answering what you think they should have asked or that you think they need - an RFP response is not the time to be doing this. If you want to add additional things then, as we have said before,, that is fine; but focus on what they have actually asked you and answering that first. That is what is going to win you this section.

A few tricks to help make sure your focus and angle are right are:

- Does the client's name appear more than yours does? It should. The client wants to know what they will get out of this partnership and it needs to be all about them and their needs being fulfilled, not the other way round.
- Make sure that each paragraph focuses on the benefit to the client as opposed to the features of your product or service. While you are selling yourselves you need to be thinking the whole time about what is in it for them if they choose to work with you.



## Be consistent with your writing style throughout

With multiple people working on the project it's important to keep your writing style the same, and even more so when you've made amendments.

We've already covered a lot of this in the 5 Be's, but as a quick reminder:

- Be concise. Short, to the point responses are more likely to be read in full, and that is your aim here.
- Check for repetition. If you have had different staff members working on different sections then it could be that there is repetition throughout so make sure you are editing with this in mind. There is nothing more annoying than reading content that repeats, and we want to keep the reviewer as focussed and engaged as possible.
- Use easy-to-understand vocabulary. Often we can fall into the trap of trying to use big words to make us come across as clever or intelligent - but actually with things like this, the easier to read and therefore simpler the language, the better. Have some empathy for the reviewers that have to read through your proposal and everyone else's too!
- Match the client language as much as you possibly can, in every way possible. Use the same terminology as they are, the same acronyms etc. This makes the whole thing seem more in sync with each other and these relatively small details make a lot of difference.
- Tone needs to be professional, but not dull. Use short sentences to keep it dynamic and keep it energetic. Breaking up the text is important too and huge blocks of text are not engaging for anyone to read.
- Get someone who has not been working on the document to proof read it. A fresh pair of impartial eyes that haven't seen the response can be invaluable in identifying errors that you might not see because you've been so invested in the project.

## Explain your pricing

Be as clear and transparent with your pricing as possible. If you're too vague with it, then they will see a red flag, and if you are vague or secretive they will wonder why. If there is any reason why you cannot give an exact cost on something then rather than writing 'it depends' or 'TBC' you need to explain why.

Remember to sell your VALUE too, especially with private RFPs. Often, private people are looking for value for money as opposed to the cheapest option, and they would be willing to pay that little bit more if they're getting more quality and a better return on their investment.

You obviously want to price yourself competitively, but don't price yourself out of the project. The company will often set out a budget in their RFP and you can either pitch based on what you can provide for that figure, or provide examples of different options that will come in below, on or slightly above the budget to show different working options.

What do you do next?



When you've sent your RFP response off it's time to take a deep breath, and relax. Then it's back down to business!

If you've put the hard work into your RFP response and know that there is nothing more you could have done then it will take care of itself. You will eventually hear whether or not you've made it to the next phase in the process, so it's definitely worth investing more time into your proposal and what you would elaborate on next time - but don't go using too much time at this stage, just in case you don't get the call back to the boardroom.

Getting the team together at this stage is always beneficial as you can take a detailed look at each section and what you did well, and where there is room for improvement next time. This RFP response can be used as a case study internally at least, enabling you to take sections that you did well and adapt them for your next RFP response as something of a style guide - NOT a template.

Learning is vitally important, and that's why you're here, so you understand how important it is to learn from the work we have all done, so if you're particularly proud of this response make sure that you refer back to it in the future as an example of just what a successful RFP response looks like.

