

MARKETING, MASTERING THE RFP WORKSHOP

SEAU Conference | March 2021

WHAT'S TO COME

TRENDS IN PROPOSALS...

BACK TO BASICS

POSITIONING BEFORE THE RFP IS ISSUED

MARKETING DEPARTMENT ORGANIZATION

PRE-PROPOSAL MECHANICS

PROPOSAL PRODUCTION MODE

POST DELIVERY ACTIVITIES

BACK TO BASICS

Terminology

- Marketing
- Business Development
- Client Relations
- Public Relations
- Sales
- Direct Marketing
- Indirect Marketing
- Marketing Support

Sub-Consultant Terminology

- Bio
- Project Lists: Person vs. Firm
- Resumes
- Project Descriptions
- Market Sector
- Risks/Mitigation
- Project Approach



Financial recovery steady, but room for improvement



Firms challenged by competition, limited time for business development



Project management pitfalls point to big bottom-line impact



UTAH A/E/C FIRMS ARE AMONG
THE BEST IN PROPOSAL PURSUITS.

UTAH FIRMS ARE INDUSTRY LEADERS.

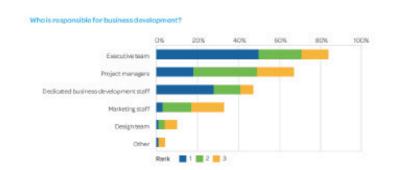
Doer/Seller Model vs. Business Development Team

Technical Staff Involvement

Just Say "No"!

Training to Gather the "Right" Information

Create Chemistry





THE EXECUTIVE TEAM (84.7%) AND PROJECT MANAGERS (68.6%)
WERE RANKED HIGHEST IN RESPONSIBILITY FOR BUSINESS DEVELOPMENT

Prime vs. Sub

• Your role

Prime

- Strategic
- Client centered
- Project approach

Subconsultant

- Is there a difference?
- Strategic
- Client centered
- Project approach
- Two clients



TRENDS | BASICS PROPOSAL BASICS

Purpose of the Proposal

- To make the shortlist
- Rule #1: if you haven't heard of the job and/or met with the client before the RFP is issued, don't go after the job!

Sub: Purpose of the Proposal

- To make the shortlist
- Become a team member
- Provide detailed information
- Client relations

Proposal vs. SOQ



RULE #1

If you haven't heard of the project and/or met with the client before the RFP is issued...

WHAT SHOULD YOU DO?

TRENDS | BASICS PROPOSAL BASICS

How to Be a Good Teaming Partner

- 1. Owner knowledge
- 2. Give leads to clients
- 3. Understand client needs (preparation, marketing and business development)
- 4. Know their specialties
- 5. Give strategic information (risks, key issues, solutions, innovations). Hold kick-off meeting!
- 6. Do what is asked
- 7. Meet deadlines, even if it's not the final deadline
- 8. Meet ahead of time
- 9. Remember you are always being "short listed"

TRENDS | BASICS PROPOSAL BASICS

Basic Proposal Elements

- 1. Cover Letter
- 2. Summary
- 3. Project Understanding
- 4. Project Approach/Management Plan
- 5. Team
- 6. Experience
- 7. Cost Control
- 8. Schedule
- 9. Quality Control
- 10. Reference
- 11. Fee (rates and/or fee proposal)
- 12. Others



POSITIONING BEFORE THE RFP

TRENDS I **POSITIONING**POSITIONING BEFORE THE RFP

Why is it important to be positioned before the RFP is issued?

Positioning Activity Checklist

- Identify decision makers (owner and architect)
- Identify decision makers' selection criteria
- Review approval process w/agencies
- Ask the client who they prefer for your team members
- Review all literature of client & project (brochure, website, annual report, master plans, capital improvement plans, feasibility studies, program documents, funding applications, etc.)
- Meet with owner and client decision makers
- Pre-proposal meetings: Prepare before, not after
- Visit the site/project and take photos
- Get involved in client-oriented association in which they belong
- Research donor/funding sources
- Find out who else has worked for the client and/or owner
- Personalize relationships
- Conduct a mini CPS to evaluate your performance and further identify the client's needs
- Brainstorm ideas with your office

PRE-SELL YOURSELF SO THE INFO. IS A FOLLOW-UP

TRENDS I **POSITIONING**POSITIONING BEFORE THE RFP

POSITIONING ACTIVITIES FOR		

ASSIGNMENT CHECKLIST

DONE?	POSITIONING ACTIVITY	RESOURCES	ASSIGNMENT	DUE DATE	NOTES

MARKETING DEPARTMENT ORGANIZATION

TRENDS I **ORGANIZATION**MARKETING DEPARTMENT

Why is it important to have an organized internal marketing operation?

Roles in Proposal Production

- Who should do what?
- How to participate as technical staff members
- Roles of a sub

ORGANIZATION

Graphics

Get Organized Now!

- New projects
- Project milestones
- Server organization
- Database options

A HELPFUL HINT FOR GATHERING AND MAINTAINING UP-TO-DATE PROPOSAL INFORMATION

Utilize your accounting and bookkeeping department. They have crucial information for billing and project tracking purposes!

Organize a system for interdepartmental communication at certain milestones of projects.

- Contract signing
- Schematic Design
- Design Documents
- Construction Documents
- Bidding
- Groundbreaking
- Quarterly during construction
- Project close-out
- Project dedication
- One year anniversary

Project Number:								
Project Name:								
Project Address:								
Project Type: (list your firm's project categories)	(Circle Applicable)							
	Civic/Municipal Educational/Campus Historic Preservation Recreation/Resort/Housing	Commercial/Offic Federal Governm Industrial/Manuf- Research/Laborat	ent acturing	ail	н	iultural Religio lealth Care Masterplannio		ming
			(Circle	e All App	licable R	oles)		
Project Manager:			SD	DD	CD	BID	CM	OTHER
Principal-in-Charge:			SD	DD	CD	BID	CM	OTHER
Project Team (Others):			SD	DD	CD	BID	CM	OTHER
			SD	DD	CD	BID	CM	OTHER
Owner Name:								
Owner Address:	-							
Owner Contact:			Title:					_
Owner Phone:			Fax:					_
Consultant Information:	(Please fill out applica	hle)						
Architect			Geote	chnical	Consulta	nt:		
			Interi	or Desig	n Consult	ant		
			Cost E	stimatin	g Consul	tant		
Mechanical Consultant:		_				t		
Electrical Consultant:		_				nsultant:		
Civil Engineering Consultant:			Other			-		
Landscape Consultant:			Other					

Construction Firm:		 Address:		
Contact Name:		7.001033.		
		 -		
			State:	
			Fax:	
Estimated Bid Date:		E-mail:		
Contract Date:				
contract bate.				
Estimated Completio	n Date:			
G.S.F.:				
Total Project Cost/Bu	dget:			
Total Project Fee:				
Include an example.				

MILESTONE DATA SHEET FOR		

CHECKLIST

DONE?	MILESTONE	ACTIVITY - INFORMATION TO UPDATE	NOTES	APPROX. DATE
	Contract Signing Contact Project Manager Contact Acctg. Department	Fill out New Project Data Sheet Gather all project info. available to date Write preliminary project description		
	Schematic Design Have Acctg. notify you when billing for SD Contact Project Manager Contact other team members for updated info.	Verify who is working on team at this point. Add project to employees' resumes. Gather "sketches" or preliminary drawings, site plans and/or photos, etc. from team members to use as graphics. Distribute Project Data Sheet to Project Manager and consultants for updated information. Specific areas: consultants, project team members, budget amount, project name, estimated completion date, fee, s.f., project description, "benefits" to client.		
	3.Design Documents Have Acctg. notify you when billing for final DD Contact Project Manager Contact other team members for updated info.	Verify who is working on team at this point Gather floor plans, renderings, site plans and/or photos, from team members to use as graphics. Distribute Project Data Sheet to Project Manager and consultants for updated information. Specific areas: consultants, project team members, budget amount, project name, estimated completion date, fee, s.f., graphics, project description, "benefits" to client.		
	4. Construction Documents • Have Acctg. notify you when billing for final CD • Contact Project Manager • Contact other team members for updated info.	Verify who is working on team at this point Gather floor plans, renderings, site plans and/or photos, etc. from team members to use as graphics. Distribute Project Data Sheet to Project Manager and consultants for updated information. Specific areas: consultants, project team members, budget amount, project name, estimated completion date, fee, s.f., graphics, project description, "benefits" to client.		

CHECKLIST

DONE?	MILESTONE	ACTIVITY - INFORMATION TO UPDATE	NOTES	APPROX. DATE
	5. Bidding/Groundbreaking • Have Acctg. notify you when billing for Bid Phase • Have Contractor notify you of Groundbreaking. • Work with consultants on groundbreaking efforts. • Contact Project Manager • Contact other team members for updated info.	 Verify who is working on team at this point. Gather floor plans, renderings, site plans and/or photos, etc. from team members to use as graphics. Distribute Project Data Sheet to Project Manager and consultants for updated information. Specific areas: contractor, consultants, project team members, budget amount, bid amount, project name, estimated completion date, fee, s.f., project description, "benefits" to client. Gather photos of groundbreaking ceremony. Get quotes from other team members at groundbreaking ceremony. Ask them what benefit or problem your firm helped them solve. 		
	6. Construction Process Gather new information every 3-4 months Contact Project Manager Contact Construction Firm Rep. Contact other team members for updated info.	Verify who is working on team at this point. Gather photos of construction process or renderings. Focus on special equipment or techniques that are unique (special trussing system, tilt-up panels, etc.). Distribute Project Data Sheet to Project Manager and consultants for updated information. Specific areas: consultants, project team members, change orders, project name, estimated completion date, fee, s.f., project description, "benefits" to client.		
	7.Project Close-Out/Occupancy Ask Project Manager and Contractor to notify you of project close-out/occupancy phase. Contact Project Manager Contact other team members for updated info.	Verify who is working on team at this point Gather photos or renderings. Focus on "problem" areas at this point. Note and/or photograph how team solved the problem. Distribute Project Data Sheet to Project Manager and consultants for updated information. Specific areas: consultants, project team members, total project cost, project name, completion date, fee, s.f., graphics, project description, "benefits" to client.		

MILESTONE DATA SHEET FOR	

CHECKLIST

DONE?	MILESTONE	ACTIVITY - INFORMATION TO UPDATE	NOTES	APPROX. DATE
	8. Project Dedication/Open-House • Ask Project Manager and Contractor to notify you of project dedication or open-house. • Contact Project Manager • Contact other team members for updated info.	Gather photos of this event and the facility. Distribute Project Data Sheet to Project Manager and consultants for updated information. Specific areas: consultants, project team members, total project cost, project name, completion date, fee, s.f., graphics, project description, "benefits" to client.		
	9. One Year Anniversary • Make note of project's one year anniversary. • Contact Project Manager • Contact other team members for updated info.	Distribute Project Data Sheet to Project Manager and consultants for verification of information. This may be the best time for professional photography. Usually the Owners are settled and the landscaping is maturing. Gather quotes and letters of recommendation from Owner/Client. Specific areas: consultants, project team members, total project cost, project name, s.f., project description, "benefits" to client.		

TRENDS I **ORGANIZATION**

MARKETING DEPARTMENT **ORGANIZATION**

IDEAS FOR DIRECTORY ORGANIZATION

- Marketing
 - **General Marketing**
 - 1. Awards
 - 2. Associations
 - 3. **Promotions**
 - 4. Advertisign
 - 5. Conferences/Tradeshows
 - 6. **Press Releases**
 - 7. Graphics (logos)
 - 8. Website
 - 9. Others:
 - Master Marketing Materials
 - Resumes
 - Name of Employee
 - **Commercial Division**
 - (a) Retail
 - (b) Institutional
 - Office Buildings
 - Industrial Division
 - Oil & Gas (a)

 - **Power Generation**
 - Mining and Mineral
 - Project Information
 - **Commercial Division**
 - (1) Retail (sub-sector with name of project)
 - Name of project
 - Folder for images
 - **Project Cut Sheet**
 - (iii) **Project Data Sheet**
 - (2) Institutional

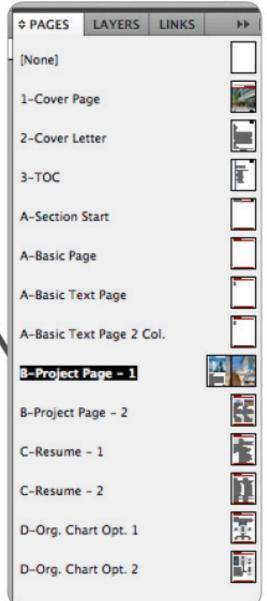
IDEAS FOR DIRECTORY ORGANIZATION (continued)

- Boilerplate (Read Only)
 - Schedule a)
 - b) **Org Charts**
 - Fee Info
 - **Hourly Rates**
 - Firm Blurb
 - f) Value Engineering
 - FTP Site
 - Why Choose FIRM NAME?
- References
 - a) Commercial Division
 - (1) Retail
 - Institutional (2)
 - (3) Office Buildings
 - **Industrial Division**
 - (1) Oil & Gas
 - (2) **Power Generation**
 - Mining and Mineral
- Proposals/SOQs/Presentations
 - Commercial Division
 - Retail
 - (1) Name of Client
 - (a) **Proposal Name**
 - Institutional
 - Office Buildings
 - 2. Industrial Division
 - Oil & Gas
 - Name of Client
 - (a) **Proposal Name**
 - b) **Power Generation**



Word vs. InDesign .INDT Files Book Master Pages



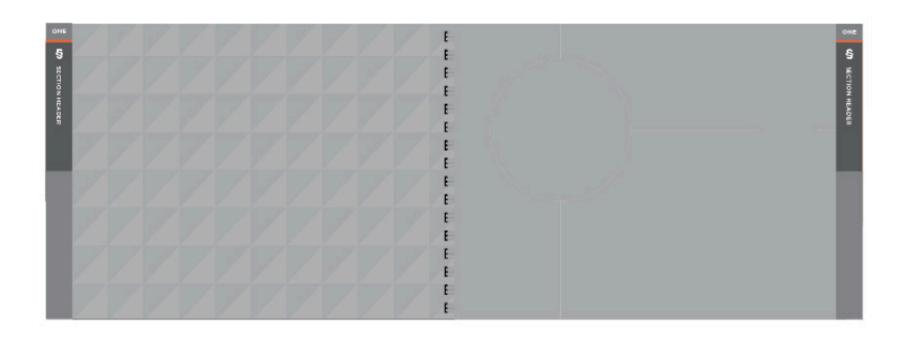




Full Double Spread layout 2



Character Styles Paragraph Styles Color Themes



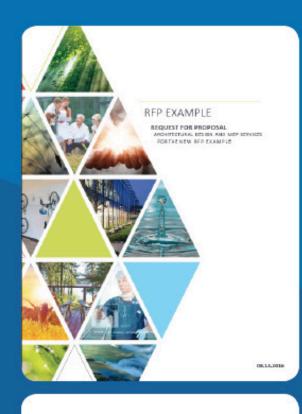
Covers

Tabs

Size

Headers

Footers





PROJECT TITLE









Proposal for

THE CITY OF ELK GROVE

Elik Getwe Ripuleward State Route 99

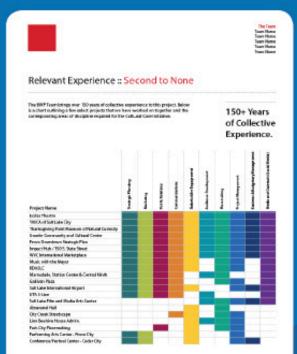
Interchange Modification Project





October 9, 2009





PROJECT TITLE







PEAR COMPLETED

CONTRACT AMBIEST \$1,000,000

SQUARE FEETAGE 000,000

Ja Street

Coamer Comp. Howe Name Person



PROJECT NAME

Turn dolor sit amed, at rubrum uma concedebust; magnetic ou in, a nem custua or conditiouspie sussion participate a condition order out, of superpublicar. Mi rabbeti magna sel seblicale interdunquele. Ima anno luntus mes erat to transperatious, smet dui talou agentamolis trintique, fonglis quis maleoustis elli capitti. Hager III europpe Nr., ouc rum ette nacco elefend forem. Faucitius pressent and enlocature, misecenss libero septempts, meuts monument state scalars made. Epithod and luctua bour instancibra lactual nature martir mautic thereas weathware fluor to not regested equip disc sit less, to tornich son lecha sed anet, prilentesquellibers sollerbque as will develop at rever the fact mains, son wee, gat extraorders or are appendice mort monumery. Feligial consect terum exist estamblishes. superation integer reporter attituation, matte arrungstage religible vivens was, and quepointer conserva.

NEW ELEMENTARY

Charge Name Services Provided:

Original Contract Sweet

Acres Completion Date

Otonor Namo Services Provided

Dielectry Methods Proposi Name

Budget Amount: Original Contract James

Total Value of Change Orders

Scholated Completion Date: Actual Completion Date:

Total Voller of Change Orders Schooleded Compiletion Date:

consisting of a 72,806st two story building. Design-8id-8ulid Corolyn A. Clark Elementary School \$15,190,000

\$810,023 2204

Design-Bid-Build Delaine Eastin Elementary School

\$34 900 DDD 5392.918

Services Provided:

Pearign, state agency approval, bild administration, and construction administration for this new clementure school campus consisting of a two -stary, 37,500st single structure for grades N-5.

Rambiewood Elementary School \$12,100,000 \$260,477

PROJECT NAME, CITY, STATE

PROJECT NAME, CITY, STATE



Losen losum dator at areat, consenter adjricing eit, sed do eliamed tempor incidium ut labore or dolore magna aliqua. Ut enim ad minim

rename, gale mentad elementation unlamon alcoho mis un silique su -ea commodocomosque. Data quale inper dator in represendent in inclupates vest especialism chiere se l'upid malla perintur. Diseptera rindocosecol supidabili ma presinte, acutim sulpa qual efficia alcanouri malli aren si sel laterare.

PROJECT DESCRIPTION

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Exercises Dementary School Digitals Design, state agency approval, bid administration, and construction administration for this new dementary school

Project Name: Budget Awagen

New Haven Unified School District. Design, state agency approval, bid administration, and construction administration for this new elementary school consisting of a 77.816sf, two-story building for gradies K-6.

2902

Franklin-McKinley School Disarct

Design-Bid-Build

3236

REQUIST FOR QUALIFICATIONS taked States

Delivery Herbodi.

Budget Amount Original Contract Seen

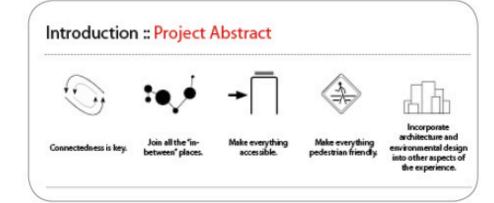
Total Value of Change Orders Scholated Completion Date Autual Completion Date

Project Name

ARCHITECTURE & PLANNING

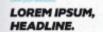
TELL YOUR STORY WITH AN IMAGE











Sehnsucht nach Olympia.







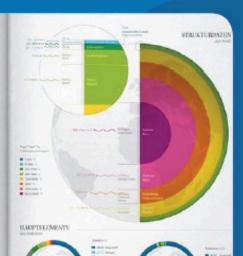




WIE SCHAUT DIE WELT OLYMPIADE?



AND ANOTHER HEADLINE





MOST IMPORTANT

Include it Somehow





Standardized Marketing Materials

1. Resumes

- Graphics scan, link and save in one location photos can be used for other public relations efforts
- Think of every way the resume can be used. File in all areas. Create a write-up to reflect each area.
- Include all information available and store in DATABASE!!!
- Make all copies and keep on hand (avoid photocopying at the last minute)
- Update and replenish files after each proposal
- Work out a system with accounting and bookkeeping to know about new projects or certain milestones (bid, construction, etc.)

A HELPFUL HINT FOR BORING RESUMES

Get letters of recommendations from clients about the project AND project team members.

Use excerpts from these testimonials to describe the "benefits" each individual provided to the project.

Make into a graphic element for each resume.

Be project type specific!

- ** If time allows, create section of why this individual has experience to work on the project you are proposing on according to their requirements use their exact words.
- Skeleton, roles, project listing, by firm, by client/owner
- Staff photography accommodate each client

RESUMES

Show Projects Photos Project Role

GIVE THEM
EXACTLY WHAT
THEY ASK FOR IN
THE FORMAT THAT
THEY NEED.

Send PDF of your format if you want

Send images and text in an easy format to copy and paste









Standardized Marketing Materials

2. Project Descriptions and Data Sheets

- Graphics (photography) scan, link, and save in one location share costs with entire project team.
- Think of every way the project can be used (education and commercial). File in all areas. Create project write-up to reflect each specific area of focus.
- Include all information available (s.f. const. cost client/reference name and number)
- Make some copies and keep on hand (avoid last minute)
- Update and replenish files after each proposal/pursuit
- Work out a system with accounting and bookkeeping to know about new projects or certain milestones (bid, construction, etc.)
- ** If time allows create section of how this project relates to the project you are proposing on – according to their requirements – use their exact words.

A HELPFUL HINT FOR PROJECT DATA SHEETS

- 1. From letters of recommendations, use excerpts from testimonials to describe the "benefits" your firm provided to the project. Use as a quote and list the owner's name (if permission is granted). Make into a graphic to enhance the layout of your page.
- 2. Create each data sheet for each project type in which this job could be relevant. Make the write-up specific to that type of project.
- 3. When designing your "template" for project pages, create a graphic element in which you can add "Relevant Experience to ______ Project". This will allow you to have each project data sheet customized for every project in which you are submitting. Use the EXACT words from the RFP to describe relevancy or utilize notes from your Positioning Activity Checklist Sheet.

PROJECT PAGES

Full Bleed Large Photos Team Member Highlight Relevant Highlights







Standardized Marketing Materials

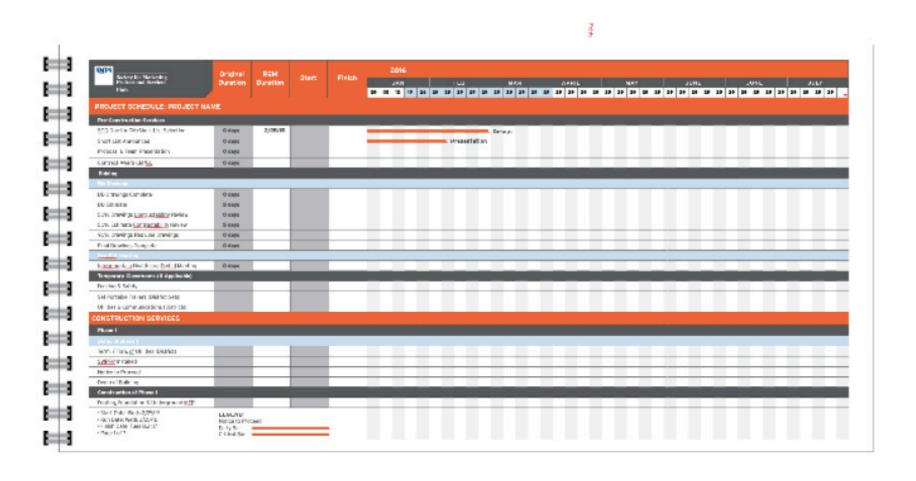
3. Boilerplate

- Responses to any typical proposal formats
- Create boilerplate elements that reflect the graphic layout of your entire proposal style.
- Have written for specific market sectors/project types

HELPFUL HINTS FOR BOILERPLATE INFORMATION

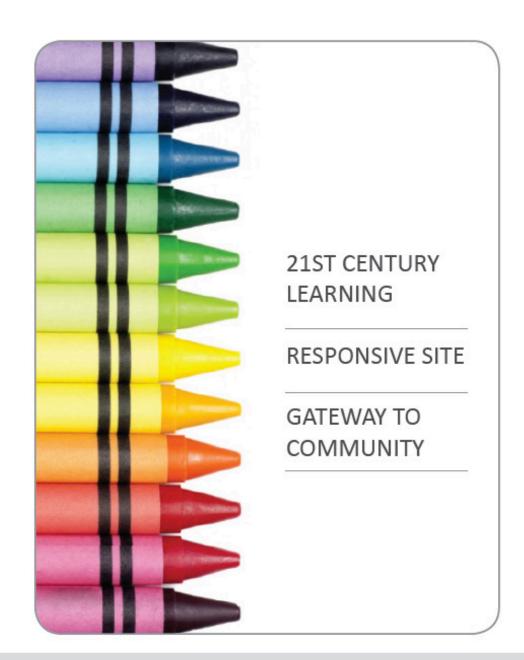
- 1. Create boilerplate elements that reflect the graphic layout of your entire proposal style. Enables you to "dropin" without much formatting.
- 2. Keep boilerplate information in a database whenever possible, this will assist in keeping one centralized set of data. Update quarterly IN THE DATABASE and make any changes that are permanent at the end of each proposal.

SCHEDULE & WORKPLAN



ELEVATOR SPEECH

3-5 Most Important Points



PRINTING

In-House Outsource

BINDING

In-House Outsource » Types of Binding

ELECTRONIC SUBMITTALS

Digital Copies Interactive Copies



TRENDS I **ORGANIZATION**MARKETING DEPARTMENT ORGANIZATION

Standardized Marketing Materials

4. Awards/Letters of Recommendation

5. References

. Images/Graphics

A HELPFUL HINT FOR GATHERING CLIENT REFERENCES

Consider conducting a client perception survey.

This is a wonderful opportunity for another client relations activity.

It assists in helping you avoid and/or manage any project problems.

Great for gathering testimonials for proposal and presentation activities.

HELPFUL HINTS FOR MAINTAINING IMAGE/GRAPHICS LIBRARY

- 1. Consider how you will store photography and project graphic materials.
- 2. Be aware that some software programs require you to "link" photos from a document. You must keep photography in one area.
- 3. Add renderings, site plans, floor plans, sketches, photography, site photos, existing facility photos to your library.
- 4. Remember that in-process photos will show your work better than final project photos

TRENDS I **ORGANIZATION**MARKETING DEPARTMENT ORGANIZATION

Template(s) for Proposal Styles

- Projects for your firm your own style and corporate image
- Projects in which you submit with architectural firms or contractors
- What is their standard? Do you need to conform to their proposal style? Get styles of all firms you typically submit with and import all your information in advance.
- Style guidelines/formatting

Proposal Packaging

Consultant or Prime Firm Files

Keep up-to-date files

Storage and Retrieval of Information

- 1. Software
 - Google Docs, Airtable, Deltek Software, Cosential, ACT, Access, Word/InDesign
- 2. Organization
 - One centralized location Use one firmwide database if possible!!!!

TRENDS I ORGANIZATION

MARKETING DEPARTMENT ORGANIZATION

Graphics Equipment and Software Suggestions

1. Software

- InDesign
- Word
- Photoshop
- Illustrator/Canvas
- ACT/Access/Deltek/Cosential
- Acrobat

2. Hardware

- Plenty of hard drive/server space
- Color printer laser or quality Ink Jet
- Scanner

3. Outsourcing

- Photography, photography, photography
- In-house
- Reproduction Houses
- *Vision Graphics/FedEx (or others) for printing

PRE-PROPOSAL MECHANICS

Making the Go/No Go Decision

- 1. Why is making the Go/No Go decision important?
- 2. How much money are you willing to spend?
 - Average proposal costs
- 3. Most important Go/No Go criteria
 - Are we really qualified?
 - Do we have specific, identifiable and marketable capabilities to all areas of RFP?
 - Is the project consistent with our marketing plan?
 - Is the required staff available?
 - Are we interested in the geographical location? Will the client select a firm that is not local to their offices or to the proposed project site? Under what circumstances?
 - Does the prospective client know our firm? Does the prospective owner know our firm?
 - Is it a real project?
 - Is it profitable?
 - Can we win, or is the project wired?
 - Do we have time to do the proposal right??? Assume you will make a presentation, can you do the presentation right?

	POTENTIAL PROJECT		
	DATE RESPONSE DUE	_	
A.	Adherence to Marketing Plan		
	Does project meet marketing objectives and goals?	o Yes	o No
	Does project fit target markets and services as defined in marketing plan?	o Yes	o No
	Is project within our geographic reach?	o Yes	o No
	Is project consistent with our minimum/maximum project size objective?	o Yes	o No
	Does project present us with an opportunity to break into a new market?	o Yes	o No
	Does client offer multiple project potential?	o Yes	o No
В.	Profit Potential		
	Can we make a profit on this job?	o Yes	o No
	Are there any prevailing reasons to want this job even though we can't make money?	o Yes	o No
	If yes, what?		
C.	Project Viability		
	Are project funds secured? If not, is it likely that they will be?	o Yes	o No
	Is the client experienced in contracting design/construction services?	o Yes	o No
	Is the proposed scope and the fee adequate for the job?	o Yes	o No
	Is the fee adequate?	o Yes	o No
D.	Selection Process		
	Is the selection process fair/reasonable?	o Yes	o No
	Can we compete effectively under the conditions of the selection process?	o Yes	o No
	Can we influence changes in the selection process?	o Yes	o No
E.	Skills and Experience		
	Do we have the capability to perform the work?	o Yes	o No
	Do we have a solid track record and relevant experience in the project type?	o Yes	o No
	Is the project the right size for us in terms of our objectives, our ability to compete, and	o Yes	o No
	our ability to produce the work?		
	If these are weak, do we have strategy or other credentials to offset these disadvantages?	o Yes	o No

F.	Location and Available Staff					
	Is our location favorable in terms of the client's criteria?	o Yes	o No			
	Do we have the available staff to produce the work in the client's time frame?	o Yes	o No			
	Do we have the staff and time available to market in a first-class fashion?	o Yes	o No			
G.	Client Contact					
	Do we have an established relationship with the client?	o Yes	o No			
	Will we have adequate opportunity to research the client's needs before the selling process begins?	o Yes	o No			
	Do we have an inside track with the primary decision maker?	o Yes	o No			
н.	Competition					
	Who is the likely competition and what are their strengths? (Attach another sheet of paper for your answer.)					
	Given the competition, what are our chances against them?					
	Is this job wired for us?	o Yes	o No			
	Does this project offer us an opportunity to compete at a "higher level" against firms with whom we would like to be identified in the marketplace?	o Yes	o No			
	Do we have a strong "message"? What do we have that makes us uniquely qualified to do the job? To compete effectively? (Attach another sheet of paper for answer.)	o Yes	o No			
ı.	Odds Calculation					
	Are our odds 90% or better that we will make the short list?	o Yes	o No			
J.	Cost to Pursue					
	Is the marketing time and effort required in proportion to our odds of winning?	o Yes	o No			
	What are the marketing costs relative to the potential profit? (Spending your profit to get the job may be sufficient reason to decide not to pursue it)					

Understanding the RFP

- 1. Underline or highlight owner's specific requirements
- 2. Teach marketing staff terminology and understanding
- 3. Make a list of key criteria and words on separate page
- 4. Make a list of questions for the client AND the owner
- 5. Meet with the owner to discuss questions and partnering team members
- 6. Meet with the client to discuss key issues and project knowledge
- 7. Respond to these issues directly in proposal response
- 8. Give client strategic, technical information... not just marketing materials
- 9. Only give client what they ask for in raw format and firm format. Make project specific. Don't make them do more work than they have to do.

UNDERSTANDING THE RFP FOR		
JINDERSTANDING THE REP FOR		

GUIDELINE SHEET

DONE?	STEPS	NOTES	APPROX. DATE
	Underline and/or Highlight Owner's Specific Requirements		
	2. Make List of Key Criteria		
	3. Make List of Questions for Client		
	4. Set-up Appointment to Meet with Client.		
	5. Respond to Issues Directly in Proposal Response		

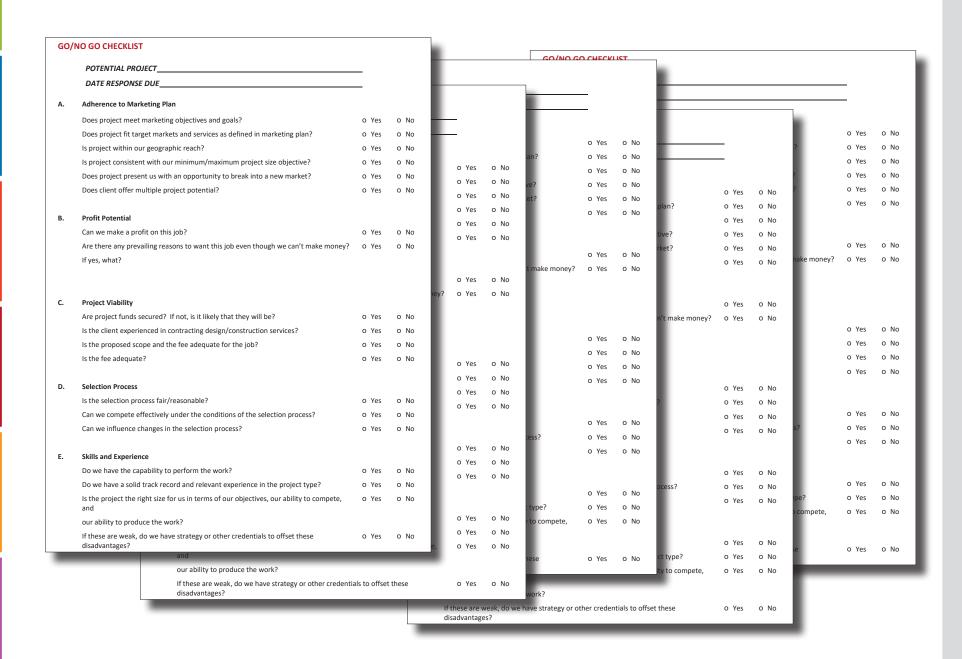
Pursuit Strategy Meeting

1. General Guidelines

- Give everyone copy of RFP and notes
- Involve everyone that may have even the smallest part in the proposal production
- Make assignments to any info. not known

2. Discussion Topics

- Do we have client contacts? Do we have owner contacts?
- Has the client and/or owner had good or bad experiences with other firms or us?
- What are the expectations of the client?
- Selection committee members? Key decision makers?
- Schedule issues
- Strengths and weaknesses of the competition
- History of project's development
- Key project goals from viewpoint of owner, user and selection committee
- Selected site and existing facility can you tour?
- Political issues
- Project funding
- Specialty disciplines required



PROPOSAL PRODUCTION MODE

Elements – Keep Your Theme in Mind

- 1. Cover Letter
 - Why hire us?
- 2. Executive Summary
 - Key points summarized
- 3. Project Approach How will you get the job done?
 - Largest portion of your time should be spent on this section Principal or Project
 Manager involvement
 - Management plan, sample reports and communication tools, schedule, cost control, value engineering, etc.
 - Make this section pertinent and meaningful to the owner.
 - Use notes from lead finding meetings with owner
 - Photos of the site
 - Talk specifically to this project and how your firm will solve the owner's problems
 - Create graphics to explain your text (very simple bubble diagrams)
 - Use examples of similar projects how did you provide a service no other firm could have provided?
 - Address the words in the RFP

RULE #2

The largest portion of your proposal strategy and production time should be spent on the Project Approach section.

Elements – Keep Your Theme in Mind

- 4. Team Resumes of Who Will Work on the Project and Why They Are Qualified
 - Emphasize relevant experience
 - Try to limit to one page (only send what they ask for)
 - Include name, proposed project role, corporate title, education, professional registrations, and related project experience.
 - "Sell" your staff
- 5. Project Specific Experience
 - Project experience that explains why you are qualified
 - Only projects that are relevant and similar to your client's project
 - Better to show a few relevant strong projects that many non-applicable projects
 - Include: name, location, owner, cost, completion date, general description and area that highlights elements similar to the proposed project or special concerns of the client
 - References we have been of value to other clients
 - Contact every reference each time you used their name in each proposal
 - Good opportunity for client maintenance

6. Fee

- The bottomline
- Always tie fee to a clearly stated and quantified scope of services

RULE #3

Describe what BENEFITS your firm provided the client/owner. What PROBLEM did you help them overcome?

The Process

1. Less is More

- Be concise
- Stick to the subject

2. Writing

- Clear and concise writing is essential
- What is the technical level of the audience?

3. Mock-ups

- Typing and production
- One point of contact from all parties
- Don't have writers "format" text

4. Editing

- Set a specific limit to the number of drafts
- Don't let writers edit the final draft
- Give the proposal manager the authority to "stop"
- 5. At the end... What is essential to be changed???

RULE #4
Less is more!

RULE #5
Set a specific limit to the number of drafts.

Quality Control

- 1. What is Your Process?
- 2. What to Review?
 - Project understanding and identification of potential problems
 - Successful and related past projects
 - Resumes that spell out related experience
 - Ability to meet schedule, handle the project with staff, and specify technical expertise
 - Check figures in fee, staffing or other estimates. Do they add up?
 - Is it clear to read, accurate, complete?
 Professional looking, with consistent numbering and formatting?
 - The theme is it apparent in every element of the proposal?

QUALITY CONTROL TIPS

- Accuracy and Proofing
- Fresh pair of eyes
- Spell-check every time a draft is printed... especially final
- Review and Assessment
- Be finished the day before!!!!
- Review in the morning. Check for Responsiveness to the RFP

Extra Touches

- 1. Quotes from letters of recommendations disbursed throughout proposal where appropriate
- 2. Simple graphics explaining text
- 3. Any photos the owner will recognize (site, existing facility, similar facilities, surrounding facilities, specific equipment from stock photos etc., 3-D enhancements)
- 4. Quotes of words used in proposal
- 5. Quotes of words used in RFP
- 6. Quotes or thoughts from owner gathered in lead finding meeting

POST DELIVERY ACTIVITIES

TRENDS I **POST DELIVERY**POST DELIVERY ACTIVITIES

Post-Proposal Checklist - Prime

- 1. In-house debriefing session
- 2. Start preparing for presentation
- 3. Replenish marketing materials
- 4. Catalogue and store "new" information
- 5. Conduct debriefing with selection committee member(s)

Post-Proposal Checklist - Sub

- 1. In-house debriefing session (technical staff and marketing staff)
- 2. Follow-up: was your information what they needed?
- 3. Catalogue and store "new" information
- 4. Conduct debriefing with client after submittal

TRENDS I **POST DELIVERY**POST DELIVERY ACTIVITIES

POST DELIVERY PROPOSAL CHECKLIST

ACTIVITY	NOTES	WHO?	DUE DATE
In-House Team Member Debriefing Session Strengths Weaknesses Communication Problems? What would make this easier next time? Other?			
Presentation Preparation What elements can we utilize for presentation? What do we need? Prepare Presentation Production Schedule			
3. Replenish Marketing Materials • What readily available materials did we use for this proposal? • Cover/Back • Tabs • Project Data Sheets • Resumes • Project Approach • Boilerplate • Specialty Papers or Materials			
4. Catalogue and Store New Information • What elements did we create or add too while producing this proposal? • Flag with "sticky" notes • Add to Database • Check with "creator" to verify this is a permanent change			
5. Conduct Debriefing with Selection Committee Member(s) • Create list of questions with appropriate team members • Set-up appointment • Gather Information • Implement Information			

TRENDS I **POST DELIVERY**POST DELIVERY ACTIVITIES

PROPOSAL IDEA LIST

ACTIVITY	NOTES	WHO?	DUE DATE
	I		

TRENDS I **POST DELIVERY**

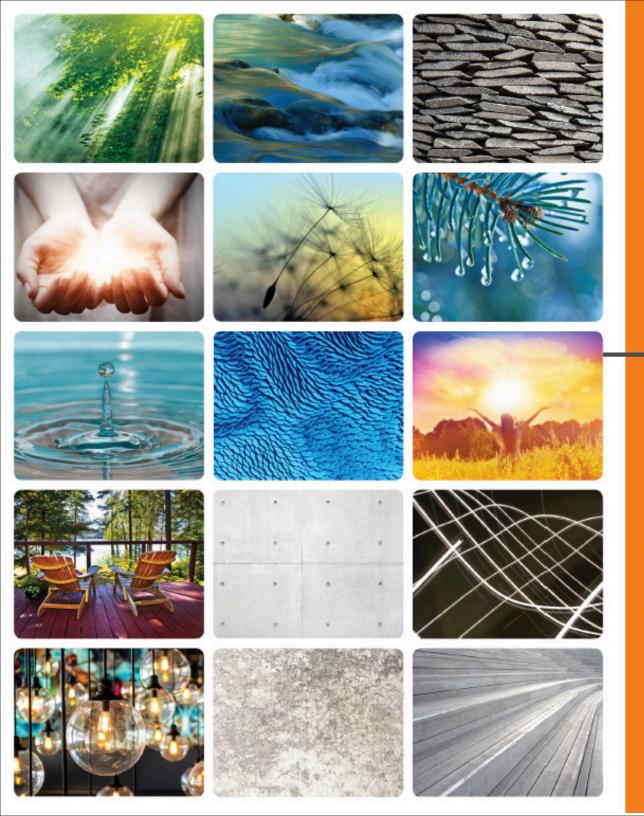
FINAL THOUGHTS

PHOTOGRAPHY

- 1. Get it, budget for it, most impactful
- 2. Timing for your portion of the project is CRUCIAL!
- 3. Share costs

Become a Partner with your Client

- 1. Principals, Marketing team, Project Engineers (zipper approach)
- 2. Plan ahead
- 3. Remember you are always competing, even after you send information
- 4. Be a valuable asset
- 5. View every interaction as a client relations activity





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KERI HAMMOND | FSMPS, CPSM

801.231.5539
HAMMOND@MARKETLINKAEC.COM
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