

## **Three Keys To Winning RFP's:**

- 1. Get There First,**
- 2. Pick The Right Battles**
- 3. Play to Win by Aligning Tactics to the Selection Process**

Is a low RFP (Request for Proposal) win-rate draining hours and revenues from your firm? Responding to an RFP can consume from 40 to 100 man-hours, but, on larger projects, it can balloon to hundreds of hours. Multiply those hours by salary and overhead, and suddenly you have a very expensive investment.

In this article, we will talk about the importance of getting there first. If you wait for the RFP, you have already lost. We will then review how to do a better job of screening opportunities. Often, you can and should say "No." Finally, we will review the motivations and patterns behind the typical RFP and then show you how to respond and win each phase – and thereby build your competitive win rate.

### **Get There First**

Waiting for the request for proposal (RFP) – is a dead end strategy in this economy. The best way to win in these turbulent times is to become the sole or preferred provider, and that can only happen by engaging clients *before* they look for service providers.

By the time companies ask for proposals, statements of qualifications, or price quotes – they are already at the end of a long decision process. They have identified and assessed a problem and envisioned and built internal consensus on a solution. Most importantly, in most cases, they have a preferred service provider in mind, a firm that helped write the proposal, and who will most likely end up being chosen. If you are not the preferred provider, the deck is stacked against you.

## **Pick The Right Battles**

Instead of responding to every RFP that comes along, ask yourself whether your time might be better spent building your own preferred or sole provider position. To pick better battles, ask yourself these questions about each RFP:

- Do we have an existing positive relationship with the client?
- Do we have unique skills, capabilities, or resources that are critical to the project's success and difficult for competitors to copy?
- Does the client recognize our unique value proposition?
- Do we have access to the client before submission or presentation of our proposal?

If you answered "no" to two or more of these questions, you may want to choose a better prospect, one better aligned with your "value."

## **Anatomy Of An RFP Decision**

If you do decide to respond, make sure you understand the motivation and process driving the client's selection decision. The more you know about why and how these decisions are made, the easier it will be to align your tactics to win.

The formal RFP selection process can be pictured as a funnel with three phases, where criteria are used first to increase choice and then to eliminate alternatives until the final selection is made. The three phases of the service provider selection process are the *Search Phase*, the *Screening Phase*, and the *Selection Phase*. Inclusion or exclusion in each phase is based on decision criteria that become increasingly selective and subjective. The number of provider candidates eventually narrows down to a single winning service

provider. Let's take a closer look at what happens in each phase and how you should respond.

*Search Phase: "All of The Usual Suspects"*

Decision criteria during the Search Phase are inclusive and designed to gather as many alternatives as necessary to assure (and demonstrate) a good decision. Inclusion is based on the client's awareness of, and access to, firms with relevant capabilities. The client's objective is to maximize choice by including anyone who is potentially qualified to help.

You can be the most capable service provider and have the most innovative ideas, a proven process, and competitive pricing, but you cannot win an engagement unless you get invited to participate in the search process. And, you can't get invited unless the service buyer knows you exist. This means you need to be recognized and easy to find, which requires elevating your personal and institutional market profile.

Advertising, publicity, and direct mail keep your firm name and brand in front of potential clients. However, unless you are part of a small firm, you may not have influence over institutional branding, positioning, advertising, and marketing. But you can establish a personal brand that is enhanced with references, speeches, articles, publications, and direct contact with potential clients.

*Screening Phase: Who Will Be Voted Off The Island?*

The Search Phase frequently uncovers too many choices to be individually evaluated. The client's objective in the Screening Phase is to winnow the group down to a manageable "short list" for closer evaluation. At this point, the decision becomes a rational comparison process. Standards for comparing similar characteristics are set, and

these criteria are used to eliminate all but the three or four "short list" competitors who most closely align to decision criteria.

Your capabilities and experience made you initially attractive during the Search Phase, but this may not be enough to sustain you through the Screening Phase. To avoid being "voted off the island" during the Screening Phase, determine the decision criteria, build preference for decision criteria that fit your strengths, and position your capabilities to align to those criteria.

*Selection Phase: "First Among Equals"*

The first two phases of the selection process are rational and, if done well, offer the prospect an opportunity to make a decision on a more subjective basis. The "short list" candidates are invited to meet the decision-makers and present their cases. Anyone who has made it this far is well qualified, so decision criteria expand beyond capabilities to the unique rational and emotional fit of one provider over the rest.

The winner in the Selection Phase will be chosen based on emotional preference value: subjective and non-verbal decision criteria that include comfort (charisma and familiarity), confidence (in the service provider's understanding of the company's needs and situation), and commitment (the service provider's demonstrated loyalty to, and enthusiasm for, the client and the project). In a word, trust.

Build emotional preference by focusing on what is different about the prospective client. To build trust, engage the client personally. Instead of telling the potential client what you are going to do, give a preview of what a working relationship with you *feels* like. Actually start the engagement. Doing that takes the same time and effort as saying what you are going to do, but it gives both you and the client a head start.

In summary, awareness and capabilities get you invited, rational differentiation keeps you in the game, but it is emotional differentiation that gets you selected.

Throughout the Search Phase, you can use your capabilities and expertise to build credibility and get invited. To survive the Screening Phase, you will need to determine and rationally align your proposal to the service buyer's decision criteria.

To win the Selection Phase, make as much personal contact as possible to demonstrate your understanding of the potential client and commitment to the project. Show them that you would make a good partner.

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The book de-mystifies a sometimes painful and complex process."  
- Tom Rodenhauser - President, Consulting Information, LLC

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A GUIDE TO SELLING  
PROFESSIONAL SERVICES  
IN TURBULENT TIMES

**ROBERT A. POTTER**