

Tips For A Win-Win RFP Process

Here are some tips to consider when preparing your RFPs.

- 1. Appearance counts!** Prepare a detailed, professional RFP. Vendors will consider the quality of the RFP when deciding whether to respond.
- 2. Give respondents ample time to prepare a customized proposal.** If you require respondents to submit a proposal in less than one month, you may end up with “cookie cutter” responses.
- 3. Be frank about the budget available for the project.** A good vendor will work with you to develop an approach that fits your budget – if you give them a ballpark figure to work with. By doing so, you ensure that all the proposals received match your budget and you avoid the risk of rejecting viable respondents who happened to exceed your undisclosed budget.
- 4. Provide an outline to which the description of services and costs must conform.** Specify what services you want and how vendors should break out the costs. For example, state that test development should be described and costed separately from test administration and list in your RFP what services should be included under test development. This approach will allow you to easily compare services and prices across the different proposals you receive.

Some tips on evaluating proposals and selecting vendors:

- 1. Focus on the *real* differences between vendors.** Most vendors offer similar services (e.g., expert psychometric assistance, application processing) and have a long client list that includes a variety of professions. So what distinguishes one vendor from another? *Truly* unique products, services, or facilities (e.g., twice the number of test sites offered by other vendors); the quality of the client relationship; and the level of customer service provided to candidates and certificants.
- 2. Ask for references from long-term clients for which the vendor provides similar services.** Talking to organizations that have weathered the inevitable ups and downs in a vendor relationship will give you a sense of how the vendor handles problems and performs *after* the honeymoon period is over.
- 3. When checking references, ask open-ended, probing questions.** For example, instead of asking, “Are you satisfied with ___?” ask the reference to describe the vendor’s strengths and weaknesses. If you are told, “Things were bumpy at first, but we’re very happy now,” probe further to find out what the “bumps” were.
- 4. Talk to organizations that have used multiple vendors.** They can provide insights into the relative strengths and weaknesses of different vendors.