

Writing RFPs That Work!

NTEN Webinar
Michael Weiss, *imagistic*

Michael Weiss

- ▶ Internet Strategy, Marketing and Development
- ▶ Founded *imagistic* in 1997
- ▶ Clients include:
 - ▶ ACLU
 - ▶ Southern Poverty Law Center
 - ▶ First 5 LA
 - ▶ Christopher and Dana Reeve Foundation
 - ▶ Family Promise
 - ▶ National Organization of Rare Diseases
 - ▶ Students Against Destructive Decisions (SADD)
 - ▶ The Ojai Foundation

STRATEGY
WE PUT YOUR IDEAS TO WORK



MARKETING
WE GET THE RIGHT MESSAGE TO THE RIGHT PEOPLE



DEVELOPMENT
WE BUILD INTERNET SOLUTIONS
THAT SERVE YOU WELL



Takeaways

- ▶ Recognizing when an RFP is needed for your project.
- ▶ Key aspects to be included in an RFP.
- ▶ How to identify your budget.
- ▶ Guidelines to writing one from the vendor perspective.

- ▶ What an RFP offers you
 - ▶ Sets your vision
 - ▶ Forces internal discussions
 - ▶ Peace of Mind
 - ▶ Ability to compare apples to apples



Do I Really Need An RFP?

- ▶ Yes! “But Why?” you ask?
- ▶ Because there is a lot of work you can do BEFORE you hire a vendor = save time & money!
- ▶ This will make you look good in the eyes of a vendor



Where Do I Start?

- ▶ Start by “looking in”.
- ▶ What do you really need?
 - ▶ Not “what would we like to have?”
 - ▶ Focus on your objectives – why are you really doing this project?
 - ▶ Prioritize your needs
- ▶ Talk to your people!
 - ▶ Include all departments
 - ▶ Meet with all Stakeholders
 - ▶ Set up your internal team
 - ▶ Assign roles
- ▶ You will soon see things you need to discuss internally!



What To Put In Your RFP

- ▶ **List your objectives**
 - ▶ We want to raise money
 - ▶ We want to build our database
 - ▶ We want to make people more aware
 - ▶ Brand building
- ▶ **Tell Your Story**
 - ▶ Who are you?
 - ▶ What have you done?
 - ▶ What do you want to do?
 - ▶ What are your current challenges?



What To Put In Your RFP

- ▶ Audience(s)

- ▶ Who are they?

- ▶ Now

- ▶ Who do you want them to be?

- ▶ What do you want them to do?

- ▶ Can you create user profiles of who those targets are?

- ▶ This is a key internal discussion

- ▶ While you do not have to be 100% clear – you need to have an idea



What To Put In Your RFP

- ▶ **Functionality Needs**
 - ▶ Newsletter
 - ▶ Password Protected Area(s)
 - ▶ Workflow/Approvals
 - ▶ Donations
 - ▶ Search Engine
 - ▶ Calendar of Events
 - ▶ Photo Galleries
 - ▶ Blog
 - ▶ Forums
 - ▶ Analytics/Reporting



What To Put In Your RFP

- ▶ **List any technology needs**
 - ▶ CMS
 - ▶ CRM
 - ▶ eCommerce
 - ▶ Social Media apps
 - ▶ Backend admin
 - ▶ Any other third-party apps
 - ▶ Platforms: PHP / .NET / Ruby
 - ▶ Hosting
 - ▶ Do you need it? (Site and/or email)
- ▶ **Section 508**
 - ▶ Do you need to be 508 compliant?



What To Put In Your RFP

- ▶ Look & Feel Needs
 - ▶ Design
 - ▶ Flash
 - ▶ Branding
 - ▶ Logo Development
 - ▶ Content
 - ▶ Outline
 - ▶ Copywriting
 - ▶ Entry
 - ▶ Migration



What To Put In Your RFP

- ▶ **Needs versus “Nice To Haves”**

- ▶ Put down your Must Haves
- ▶ List the wishes and wants
 - ▶ Phased Approach?

- ▶ **Schedule**

- ▶ RFP Issued Date
- ▶ Proposals Due Date
- ▶ Decision Date
- ▶ Kick Off Date
- ▶ Launch Date – hugely important!
- ▶ Any Dates coinciding with the Launch Date (campaigns, etc.)



What To Put In Your RFP

- ▶ **Internal Team**
 - ▶ Main Point
 - ▶ Decision Committee Members
 - ▶ Availability issues
 - ▶ Vacation Schedules
 - ▶ Multiple Offices
 - ▶ Division of Roles

- ▶ **Ownership of Web site and Code**
 - ▶ Make it clear that you OWN it ALL



What To Put In Your RFP

▶ BUDGET!

- ▶ Really? YES!
- ▶ Because it gives vendors a frame of reference
- ▶ If no real budget number – include a number that sends you running to the hills – set a ceiling
- ▶ No Budget = No Scope



Budget Reality Check

- ▶ **Sample Development Budgets**
 - ▶ Small: \$10,000 to \$50,000.
 - ▶ Large: \$50,000 to \$100,000.
 - ▶ Time is money. These projects take time.
 - ▶ Negotiate rates, but hours are hours. Compare apples to apples.
 - ▶ \$20 an hour to \$200 an hour.



What To Put In Your RFP

- ▶ **What to request from Vendors**
 - ▶ What is their process?
 - ▶ What is their history?
 - ▶ References
 - ▶ Their Approach
 - ▶ It is too hard to ask for an exact scope as you may not know it yet
 - ▶ Rather – ask them how they would approach the project
 - ▶ Better yet – have them summarize what the project is about
 - ▶ Explanation of their budget
 - ▶ Hours Estimates
 - ▶ Examples of their work
 - ▶ How do they handle Usability Testing
 - ▶ How they handle scope creep and challenging budgets/timeline



Who Do I Send It To?

- ▶ **Get a short list of firms**
 - ▶ Keep it small – 3 to 5
 - ▶ 5 twenty page proposals is a lot of bed time reading
- ▶ **Get referrals from colleagues**
- ▶ **Give them a chance to ask questions**
- ▶ **Meet with them**
 - ▶ In-person is best
 - ▶ Phone is fine



Conclusion

- ▶ You need to issue an RFP
- ▶ By doing so you force yourself to do some initial work
- ▶ This will help you set your scope & expectations
- ▶ You need to set a budget range
- ▶ Keep your vendors to a short list

- ▶ Q & A



Thank you

▶ Feel free to contact me...

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