

16 REASONS FOR BREAKING THE RULES ON RFPs

When the rules prevent the meaningful flow of critical information and dialogue – break them.

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1. Leveling the playing field does not make for optimum decisions. When complexity exists, it is helpful to highlight differences rather than mitigate them. Yet many RFP responses reduce critical information to a spreadsheet grid or rote written answers that don't really assess differences. The goal of competition is to improve the quality and value of the selected solution provider. Yet, paradoxically, many RFP processes reduce rather than enhance the quality of competitive information in a desire to "be fair" or "level the playing field."
2. It is in the best interest of the client to break the rules – whether they choose you or not. We are trying to build a solution that exactly meets the needs of the client's key stakeholders – one that truly creates value. To do that we need to have a *dialogue* with those stakeholders.
3. Solution providers have to expand rather than reduce richness of communication at the critical point of decision. Huge amounts of time have led up to this situation; huge amounts of time will be spent living with the consequences. You are only asking for 30 – 40 minutes of a person's time so that a well informed decision can be reached – again, whether they choose you or not.
4. If insufficient time is spent in the decision, clients will spend much more time trying to fix what went wrong. A serious negative impact can be avoided by spending a little more time choosing the right solution up front.
5. Reciprocity – *quid pro quo*: we are willing to spend a great amount time (perhaps hundreds or thousands of person hours) and energy of our key people with no promise of return. However, all we're asking for is a comparatively small expenditure of time from key people at the client organization so the time we spend can help the client make a good decision in their own best interests.
6. Most experts do not prescribe without a thorough diagnosis. You wouldn't want your surgeon operating on you without asking all the necessary questions. It would be malpractice. A client shouldn't want solution providers operating on their company without a thorough diagnosis either. If the client is willing to go into something blindly, tactfully question their thinking.

7. “Aren’t you the expert – don’t you know?” If a client is willing to treat you as the expert, then they need to trust your expertise and let you talk to their key stakeholders. (You’re the expert in the solution. The client’s people are the experts on the current condition of their company. Let’s share and combine expertise.)
8. The government purchasing model is not the one you want to emulate (unless, of course, this is the government).
9. How people sell is a free sample of how they solve. If a client doesn’t meet with solution providers before they hire them, clients rob themselves of crucial information and differentiation – such as how well solution providers use the client’s time; how skillfully they can diagnose; how quickly they can build rapport and communicate effectively; how well they work together as a team. Clients shouldn’t eliminate differentiators unless they truly are not important.
10. Clients should let each solution provider follow their own course of action and let the provider know that they will be judged by the efficiency and effectiveness of their approach.
11. In complex solutions, people are not commodities, not interchangeable cogs, nor are their processes, methodologies, and tools. They cannot be effectively judged by written responses or resumes, and certainly not in a one-hour presentation.
12. Client intermediaries who talk to their key stakeholders and then, in turn, give the information to potential solution providers, create two key problems:
 - There is a critical loss and filtering of information in the translation.
 - The intermediary will not ask the same questions, nor push against mental models and pre-suppositions, as would an expert solution provider.
13. Bidders conferences (and/or putting all questions in writing and distributing to everyone) have at least a couple of problems:
 - Competitors will not ask penetrating, revealing questions in front of their competitors, nor will they ask questions that would indicate the direction of their thinking or solution development. Yet, these may be the critical questions to ask.
 - Just as the client company makes potential solution providers sign non-disclosure agreements, agreeing not to reveal any proprietary or confidential information about their business, it is not fair to ask solution providers to give their analytical and diagnostic process to their competitors for free.

14. People do the work, not proposals, and every RFP response essentially says: “Yeah, we do that,” or “Yeah, we’ve done that for others.”
15. This is a marriage—you wouldn’t want to marry someone without getting to know them, without spending some “quality time.”
16. Projects often fail because relationships fail, partnerships fail, and communication fails. Spend the time to assess and establish these key success factors up front.

“85% of all relationships, personal or business, fail due to undefined expectations or ambiguous goals.”

*—Institute of Internal Auditors Convention
also by Buzz Buzzbee, AT&T*