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What Clients Want in RFPs: Firms Can Win More New Business by Tapping Nine Hot Buttons in Proposals, Consultants and Clients Say

RFPs are crucial to agency growth, but as we discussed in the Oct. 8, 2008 issue, they can lead to much hair pulling and gnashing of teeth. Many are poorly written and vague. And according to a "State of Public Relations" survey conducted earlier this year by the Council and Kelton Research, 87 percent of all public relations practitioners said they believe there is a need to provide more guidance to those who develop and issue RFPs.

But flaws notwithstanding, they are a significant source of business: RFPs account for approximately one-third of all new business wins for PR firms, according to the Council's annual Business Benchmark survey. So unless companies develop better RFPs (see sidebar to learn about the Council's efforts in this area with [RFP Builder](#)), you need to learn how to respond to one—or improve your existing processes for doing so—regardless of its quality.



Jerry Swerling  
Director of the  
Strategic PR Center  
Annenberg School  
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Just because the RFP is lousy doesn't mean your response must be lousy, too, confirms **Jerry Swerling**, a PR management consultant and director of the Strategic PR Center at the **Annenberg School for Communication**, University of Southern California, Los Angeles.

So how do you deal with RFPs of varying quality? Swerling—and some clients—offered insights in what clients want... and how you can give it to them.

It's a lesson many agencies need, says **Michele Harris**, founder and CEO of **Smarti Solutions**, a PR agency search firm. Just because an agency is good at what it does doesn't mean it's good at *presenting* what it does.

Her firm develops RFPs and helps clients hire the right agency. Her clients want a strategic vision, she says. But sometimes, agencies are afraid providing that is tantamount to providing uncompensated work. That, she says, is a mistake. Read on to find her and our other experts' tips for avoiding similar mistakes and boosting your firm's RFP success rates:

**1. Don't hold out—offer real, strategic insights.** It's not about giving away the tactical details; it's about giving thoughtful, strategic ideas on what you would do to drive the client's business. Each agency has a different approach, a different perspective. Clients need to know yours, she says. They want *your* answers to questions such as "How do you guys think? How will you handle our business?"

There's world of difference between sharing a strategic vision and giving away the store, she says.

Swerling offers a similar perspective: "A common lament among agencies is, 'We don't want to give away our work for free.' Often, agencies don't want to even hint at a possible strategy. But, he asks, how else do you expect clients to make decisions? Reputations change. Staffs change. Decisions are made based on *insights*, he says. That doesn't mean you have to give away the store: A single insight, a point of view, about the client's business can set you apart and demonstrate your value, says Swerling. "Without that, the client has nothing."

**2. Eschew agency-speak—think like the client.** Agencies tend to want to tell their stories from their perspective. But the better approach is to put yourself in the client's shoes, Swerling says. Do some research: What is this RFP call really all about—what changes or challenges does it suggest the organization may be facing? What's the *company's* situation? "Respond in a way that demonstrates real empathy with the client," he says.

That means communicating in their language. "Believe me, I have seen time and time again: There is a huge gap between agency speak and client speak," he says. You need to bridge that gap.

Along those same lines, "Don't take too many liberties with your response," counsels Swerling. He's seen many situations in which the responses simply don't match the questions. Often, that's because the agency is trying to add value—but the client view is, "They haven't answered our questions."

**3. Tailor and target—don't rely on generic clips or case studies.** "What I really want to see is that the agency has developed a fundamental understanding of our business, our messages and who we are trying to talk to," says **Brian Lynch**, U.S. public relations manager for **SCHOTT**, a global high-tech specialty materials manufacturing company with 17,000 employees and a presence in 42 countries. The company recently completed a PR RFP, so these issues are fresh on his mind.

Unfortunately, instead of targeted responses, he often got clips. "When I issue an RFP, I pretty much assume that every response I get back will be along the lines of, 'We'll get you clips.'" Clips for the sake of clips mean nothing to him. "I want intelligent clips that speak to our key stakeholders and positively influence the brand's value."

Too often, Harris has seen agencies include cases studies that simply aren't relevant to the potential client. Or they are old. If there aren't relevant ones, she concedes, then something is better than nothing. But if you can, try to match the examples to the specifics of the company you are pitching. Think beyond industry, she counsels. Consider PR budget, market share, name recognition, etc. Use recent, relevant examples.

It's a simple concept: personalization. "Everyone expects personalization," says **Kelly Wenzel**, until recently CMO of **Tideway**, a global



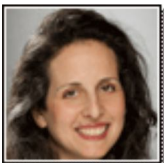
Michele Harris  
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software company (and soon to be senior VP of marketing for *Undertone*, an independent online *advertising network*). "That's the cost of entry. Prefab responses don't cut it."

**4. Ensure quality control—avoid sloppy mistakes.** Several of the clients consulted have seen more than their share of proposals full of typos and other careless errors. Harris tells of a well-known agency whose proposal had a page with nothing but "insert company template here" written on it.

Author **Lisa Tener** has an even better story. She and her co-authors wanted a publicist for their book, *The Ultimate Guide to Transforming Anger*. She received four responses to her RFP. "More than one firm sent us a boilerplate that still had the name of another book listed in certain places."

**5. Banish the boilerplate—templates get tossed.** In fact, you want to avoid the boilerplate as much as possible, says Swerling. "Make it seem as if you are writing for that client."

If you *are* going to be compiling material for other pitches, at least don't make it look like a template. Have somebody go through the final proposal carefully, says Wenzel. They should proof it and make sure it is completely customized to the client.

That's the sort of customization Tener wanted—but only one agency gave it to her. (Only one firm actually read the book.) She also wanted to hear why a firm would do a better job than the competition. And she's not alone.

**6. Add value—but don't rewrite the RFP.** Lynch wants to know what *this* agency can offer that no one else can. "I want and need a strategic business partner that will provide value to the program."

But providing that value can be tricky, warns Swerling. You want to add value and stand out from the competition, but you need to guard against coming across as arrogant.

After all, says Harris, you aren't working on this account yet. Don't assume you have all the answers. And don't assume you know the client's business better than they do.

If it sounds as though you are telling the potential client what should be in the RFP, you might just get eliminated, Swerling cautions. The client could get defensive about what he or she missed—and doesn't want the boss to know.

Don't suggest they didn't craft or execute the RFP correctly. Instead, frame your suggestions as something extra—i.e., "We've given your situation a great deal of thought, and here are some ideas we came up with."

**7. Talk ROI—focus on business outcomes, not just PR outputs.** Show value for the money. Be very clear about what the client is buying, says Harris. For example, "What can they expect in the first 30 or 90 days? What will they get for the fee?"

**8. Focus on the frontline team—not figureheads.** Don't sell your A-team if it's not going to be involved on a day-to-day basis, warns Harris, touching upon a common complaint among clients and prospects. You can tout your management—but if possible, let the client see whom they'll be working with.

**9. Interact and engage—attend to the entire process.** Wenzel no longer issues RFPs, and her reason is enlightening: "Every agency I have selected has been on the back of referrals and relationships. I can [no longer] fathom doing a blind agency RFP process."

Even with RFPs, it's still about relationships. Harris expects public relations firms to ask questions. This demonstrates that they are thinking about the situation and engaged in the process. You don't have to have the answers—but you want to show you've thought through the issues.

In addition, she says, inviting a prospect to meet the team is always a good idea.

Lynch agrees: It's the entire process that matters. "I'm not just evaluating the prospective agencies on their response to the RFP, but on how they conduct themselves leading up to it," he says. "I make myself available to the agencies and I want them to ask intelligent questions. I'm evaluating how well I work with the team and my interactions with them."

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**PR Firm Toolbox: Direct Clients to the Council's RFP Builder Resource**

Of course, building a better RFP would help everyone concerned. That's why the Council of Public Relations Firms created [RFP Builder](#). It's a tool to help clients design an RFP and conduct an agency search. (It's free to use, but there's a \$125 fee to download the RFP.)

"We want to help create a standard for writing an RFP that is mutually beneficial for public relations firms and the organizations that hire them," **Kathy Cripps**, Council president, said in a press release.

"Corporations spend a tremendous amount of time trying to identify the right agency to hire. That's why it is always so disappointing when an RFP acts more like a barrier, rather than a gateway to a productive client/agency partnership."

Ideally, [RFP Builder](#) will change that, helping clients write an RFP that makes it clear to the PR firms what the organization wants.