

REACHING FOR PERFECTION

Providing and requesting specific pieces of data in an RFP can help solution providers create a better proposal and pricing structure that align with your association's needs. As an added benefit, it also saves you additional phone calls, emails and time!

The next time you have to send an RFP, reference this checklist of what to consider before getting started, what information to provide potential solution vendors and what to ask them.



Evaluate and Consider.

Is a formal RFP process required for this purpose?

Is there an easier way to save valuable staff time and resources?



Be Concise.

Association staff are juggling full schedules. Make it short and sweet, and ask respondents to do the same.



Less Paperwork/More Collaboration.

Would it be better to do a call for qualified vendors and then meet with vetted companies to discuss goals and brainstorm the best solution before the industry partners submits a formal proposal?



Provide Feedback.

Provide feedback to companies that submitted a proposal, give them a few minutes and key points to debrief on the proposal. Industry partners improve services based on the feedback of the community.



Be Clear and Open.

Be clear on the end goal: What is the end goal/Where do you want to be? Be open: In addition to solving your immediate challenge you might hear ways of solving a problem that you didn't anticipate.



WHAT TO CONSIDER BEFORE REQUESTING INFORMATION



What are the goals and objectives?

- + Improve operations
- + Increase revenue
- + Offer a new product
- + Reduce labor
- + Improve the member/vendor experience
- + Be specific as possible. Paint a picture of what success will look like. This helps align expectations and improves the chance for a successful partnership



What are the timelines/deadlines?

- + Questions
- + Site visits/premeetings
- + Evaluations
- + Presentations
- + Final selection
- + Anticipated live launch date(s)
- + Submission requirements
 - What do you need to deem the industry partner as the "right" partner?
 - Number of pages, references, timeline, project team, role of the association, alternative solutions



What are the selection criteria?

- + Price
- + Innovation and technology
- + References/experience
- + Best solution(s)
- + Streamlining operations
- + Overall value
- + Improving member experience
- + Weight the criteria in advance so your team is clear on which of them are most/least important

INFORMATION TO INCLUDE WHEN SENDING AN RFP

MEMBER COMMUNICATIONS

MAGAZINES • DIRECTORIES • SHOW GUIDES • ENEWSLETTERS • WEBSITE ADVERTISING • ONLINE MARKETPLACES • CONFERENCE APPS • PROGRAMMATIC/RETARGETING

- Number of total members
- Number of supplier members
- Number of existing print and digital communications
- Describe existing print and digital communications, how they are managed, what are you looking to improve?
 - + Print specifications
 - + Distribution
 - + Deliverability rates
 - + Gross revenue from advertising for past three years
 - + Number of advertisers and ad pages per issue for past 12 months per product involved
 - + Page views and unique users for past 12 months for each website involved
- Describe your member and industry buying power (spending on products/services)
- Can non-members be contacted?
- Are there any groups that cannot be contacted for advertising?
- Compensation and expenses requirements

EVENT MANAGEMENT

SHOW MANAGEMENT • EXHIBITOR AND SPONSORSHIP SALES • APPOINTMENT-BASED EVENTS

- Average number of exhibitors per year
- Number of event attendees
- Square footage of event
- Current exhibitor and sponsor rates, and what's included in purchase
- Total event revenue
- Expo background
- Current prospectus, product categories, and other marketing materials

CAREER CENTERS

VIRTUAL CAREER CENTERS • JOB BOARDS • CAREER CENTER NETWORKS • JOB POSTING SALES • PROGRAMMATIC/RETARGETING

- Is there an existing career center?
- Number of total members
- Average traffic to association website
- Job board wish list
- Total annual budget
- Average job postings per month (for existing job board)

AMS SOLUTIONS

ASSOCIATION MANAGEMENT AND MEMBERSHIP SOFTWARE • IMPLEMENTATION • WEBSITE DESIGN • DATA CLEANUP

- Total number of individual profile records on file
- Are you a trade or professional association?
- Staff size
- Do you have an existing AMS?
- Who is your AMS provider?
- If no AMS, what is being used in lieu of an AMS?

ONLINE LEARNING

LEARNING MANAGEMENT SYSTEM • WEBINARS • WEBCASTS • HYBRID MEETINGS

- Do you offer certifications or credentials?
- Average number of webinars offered per year
- Average attendees per webinar
- Do you have an existing LMS?
- Who is your existing LMS provider?
- If no LMS, what is being used in lieu of an LMS?
- Does your LMS integrate with your AMS?

INFORMATION TO REQUEST FROM A SERVICE PROVIDER IN AN RFP

MEMBER COMMUNICATIONS

- Sales expertise and examples of success
- Experience and relationships in industry
- Account management team and structure
- Sales strategy and approach to the market
- Examples of comparable communications
- Reporting abilities - for specific projects and association
- Logistical support and lead generation capabilities
- References of comparable clients
- Estimated costs

EVENT MANAGEMENT

- Proposed staffing
- Sales strategy and approach
- Examples of service, growth and sales success
- Unique service abilities
- Methods for gaining new exhibitor leads
- Average size of current conferences
- # of conferences conducted annually
- Samples of past exhibitor floor plans
- Samples of past marketing materials
- Software capabilities
- Technology capabilities for attendees and exhibitors
- Reporting abilities
- Client list
- References
- Itemized fee schedule

CAREER CENTERS

- Website/career center capabilities
- Marketing support functions
- Reporting capabilities
- Subdomain and website integration capabilities
- Job posting capabilities
- Multilingual site capabilities
- Project management support
- Account management structure
- Admin user tools & support
- Customer service
- Support & training
- Fee structure

AMS SOLUTIONS

Indicate level of support for each of the following:

- Email, marketing, & communications
- Administrative features
- Member features
- Individual member records
- Organizational records
- Regions
- Accounting
- Events management
- Fundraising/development
- Grands & awards
- Employment services
- Technical abilities

ONLINE LEARNING

Request that providers indicate their level of support for your organization's requirements in each of the following areas:

- Account management
- Devices
- Browsers
- Course registrations
- Course completions
- Administration tools
- Reporting
- Integrations
- Learning methods