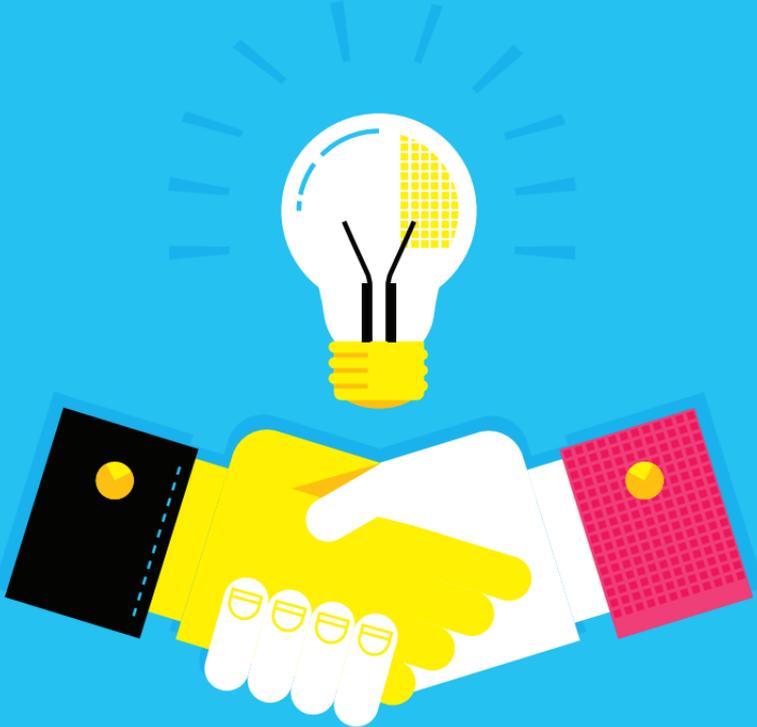


Smart Practices for Hiring the Best Creative Partner



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No organization has the skillset or expertise to do everything itself. Whether it's the construction of a new research laboratory or the creativity and strategic thinking to execute your next marketing campaign, every organization has gaps in their knowledge and abilities that must be filled by outside partners to get the job done right.

For this reason, some organizations establish procurement policies to help project managers navigate the process of finding partners to meet the specific needs of the project. But the problem with this cookie-cutter approach is that some professional services can't be forced into standardized processes and procedures.

Creative services—like branding and website development—are the type of professional services that just don't neatly fit into the procurement box. Try as we might, we can't compare one design firm to another in an apples-to-apples way. While most firms will have some similarities, there will inevitably be differences in creative focus, staffing expertise, and processes that can't be quantifiably measured.

These differences can all be confusing and frustrating for project managers to navigate when trying to choose a creative partner, especially as they deal with the anxiety-inducing prospect of investing significant time and money into a project they need to get right.

If you're a project manager looking for guidance on finding the best creative partner, or a procurement specialist looking for ways to streamline your company's policies, this book will help you to navigate your search and get results that will provide the return on investment you need.



Chapter 1: Know your options

The first step to hiring a creative partner is knowing the options you have in conducting the search. Every organization has their own policies and procedures in place, so make sure you know yours. These policies will provide the boundaries within which you can operate your search.

- Does your organization give you free rein to communicate directly with potential partners and select the one you believe is the best fit?
- Are there purchasing limits that cap the amount of money you can spend before having to go to a more formal bidding process? If so, what are those purchasing limits?
- Does your organization require you to use a standardized Request for Proposal (RFP) or Request for Quote (RFQ) process, or do you have the option to conduct the bid process in a way you see fit as long as it's transparent?
- Are you required to receive a minimum number of bids before you can start reviewing your options?

There are advantages and disadvantages to each of these paths forward. If the project manager has free rein over communicating with and choosing a creative partner, the process from start to finish tends to run more efficiently since there are fewer hoops to jump through and fewer people with a hand in the project. Many organizations are uncomfortable with this way of operating, though, as this autonomy limits oversight and allows for funds to possibly be mismanaged.

Purchasing limits are one way organizations find a balance between getting smaller projects done quickly and keeping oversight on project managers when larger sums of money are in play. Purchasing limits vary from organization to organization, from as little as \$1,000 to as much as \$50,000 or more in some cases. The downside to purchasing limits is when a project manager deliberately seeks out products and services with costs that fall under these arbitrary spending caps, just to avoid them. The result is that you often aren't engaging with the best partner or receiving the best solution to your problem, but rather the one that meets the spending limitations.

Formal bid processes come in many forms, from the traditional RFP to more contemporary processes like the [Expository Sketch](#) that's being touted by Stanford University technology strategist Zach Chandler.

“the RFP may actually hinder these very projects you're trying to add efficiency and clarity to”

Formal bid processes give more oversight to the organization and can sometimes provide needed structure for internal teams that have a lot of decision makers or stakeholders.

Depending on the requirements of the bid process chosen or required by the organization, there can be some significant negatives to operating this way. For example, standardizing RFP usage across an organization is an attempt to make organizational requirements and procedures clear, remove bias from the process, and find the best price. But, depending on what goods or services you're acquiring, the RFP may actually hinder these very projects you're trying to add efficiency and clarity to.

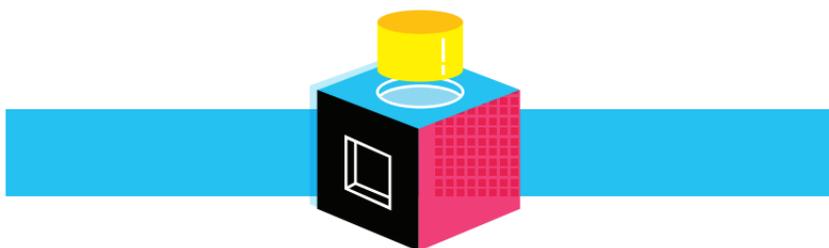
In the pages that follow we'll look at the pros and cons of RFPs and other formal bid processes. If you must go this route, the number one rule is to intentionally seek out efficiency within the process to avoid getting bogged down.



Chapter 2: Ways to hire a creative partner

After determining your options for engaging potential partners—and before actually opening up those lines of dialogue—it’s important to clarify just what type of short or long-term engagement you want to create with a creative agency.

Every design and development firm has their own business model. Some will work with dozens of different clients during a given year, while others prefer to focus on doing excellent work for only a select few larger clients. Within this spectrum are also variations in price and quality, and whether the firm does templated or fully custom work. Understanding the type of service and engagement you are looking for will be important to finding the right fit.



Single engagement

The majority of work you’ll probably seek out is for a single engagement project such as a rebranding effort, marketing campaign, or the development of a new website. This is usually a pretty straightforward partnership where the budget, timeline, and deliverables are outlined up front, and the relationship is terminated

at the completion of the project (or moves into a maintenance plan, if it's a website project). However, if things go well, this may be a partner you choose to come back to for future engagements.

Agency of record

Hiring a firm on a fixed-term contract to handle all of your advertising, marketing, and creative needs as the organization's "agency of record" was once a popular model for engagement with creative agencies. But in recent years this model has become much less

common. The reason? Expertise.

"no one firm can be an expert at everything, and organizations are finding that they may get better results by engaging with a number of different, specialized firms"

No one firm can be an expert at everything, and organizations are finding that they may get better results by engaging with a number of different, specialized firms. Still, some organizations with limited internal resources to complete the work or manage multiple contracts and partners may still find this model useful.

Retainer

When you have the organizational infrastructure to manage contracts with multiple partners—including cross-organizational teams needed to get complex projects done—your organization may look to hire a firm with specialized expertise on a monthly or annual retainer. The benefit of this arrangement is that you have ongoing, immediate access to the firm's expertise within the number of hours you've contracted.



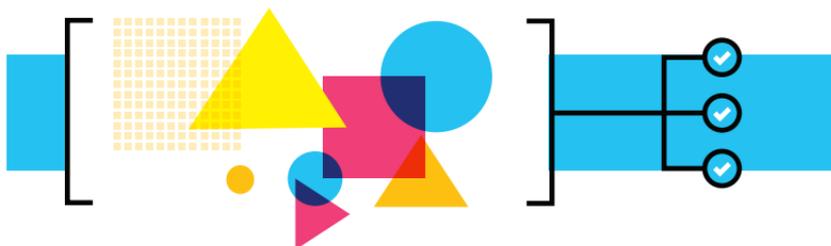
Chapter 3: Qualities to look for in a creative partner

After pinning down your process options and how you'd like to work with your next creative partner, it's important to have a clear vision of the qualities you expect this partner to bring to the table.

Ability and expertise: What are the firm's specific areas of expertise? If a firm claims to be "full service," ask them what they do best. While they may be able to accomplish everything you ask of them, no firm can provide true expertise in all areas.

Creativity: Creativity comes in a lot of different shapes, sizes, and color palettes. All creatives are inspired by different styles, experiences, and passions, so it's important you select a creative partner that you feel can convey the message you want to send in the way that most effectively engages your target audiences.

Strategic thinking: It's one thing to be able to create a beautiful new graphic identity, and another thing entirely to strategically implement it across multiple channels to help your new branding reach your target audiences.



Budget: Your budget will determine a lot in terms of who can do the work you need done.

Location/proximity: Technology makes it easy to work with partners from around the globe. But, depending on your business type, needs, or personal preference, having a partner who's only a few miles away may still be very important.

Availability: One sign that you're working with a good creative firm may be that their time is limited. However, no matter how good they are, this limited availability might not mesh with your looming deadlines.

Project management: Do you want to be hands-off or hands-on when it comes to the development of your project? A strength of some firms is their ability to manage their own time efficiently and deliver you a quality outcome on time and on budget. Others produce exceptional results, but may require a little more oversight to stay on task. If you have the resources to manage the project, then the quality of results may be worth the extra work on your part.

Cultural fit: Finding a partner that fits with your company's culture is an often overlooked piece to the puzzle of doing great work together.



Chapter 4:
Leading a direct
engagement to find
the best partner

If you're fortunate to work for an organization that gives you freedom to search for a creative partner in the way you choose, the best way to lead this process is always to connect with a number of firms directly and see who's the best fit for your organization.

This direct communication eliminates the wasted time spent filling out forms and documentation for a formal bid process. It also lets you get to know the firm you may be working with on a more personal level, and allows you to engage these firms in helping to generate solutions to your problem that you may not have thought of on your own.

Do your research

Your ultimate goal is to partner with the best creative firm who can complete the project within your budget and timeline and deliver great work that helps you meet your project objectives. Spend a couple hours polling your peers about firms they've worked with, conduct a simple Google search, and identify the firms that are doing the same sort of work for your competitors—and doing it well. You may even consider identifying companies that are doing great work in other industries, as they may introduce some new creative ideas.

You should strongly consider making brief phone calls to the 3–5 firms that interest you the most to see if they think your project would be a good match and begin to build that relationship.

Limit your options

If your team wants to see and evaluate multiple firms rather than just trusting your judgment, then focus your research and eliminate all but 2–3 options. This will ensure that any deliberation that does happen will stay relatively short, and you'll have been able to pre-screen all options.

If you put in the work to identify the 2–3 best firms to meet your organization’s needs, then this limited pool can save your team the time and energy of sorting through a larger pile of potential options.

Communicate openly and honestly

Once you’ve identified a short list of firms you are interested in, and you’ve begun to make those initial phone calls, be sure to communicate openly and honestly with those firms, and encourage them to do the same.

“the type of firm you really want to work with is one that works collaboratively with you and contributes actively to solve your problems”

Share your vision for the project and listen to the ideas they may be able to pitch to you. Just as importantly, though, don’t avoid the difficult questions about budget, competition for the project, or who the true decision makers or influencers are in the process.

Many people feel uncomfortable talking about money, but the sooner these crucial pieces of information are out in the open, the sooner you can get down to doing the real work.

Be open to new ideas

One of the top reasons to work with an outside firm on any project is the value of perspective and expert strategic planning that comes with it. The type of firm you really want to work with is one that works collaboratively with you and contributes actively to solve your problems. If you think you already have all the answers and simply want a production team to make it happen, you should expect some pushback from any expert creative team you hire.

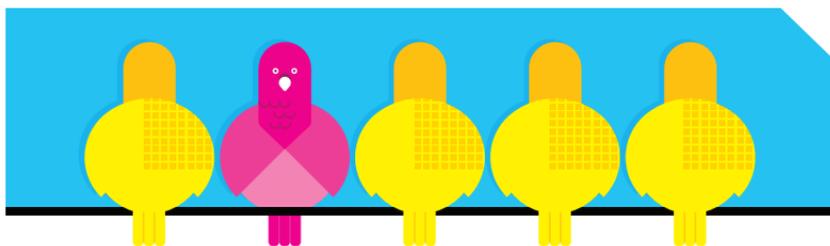
If this resistance to new ideas is coming from other members of your team, then help the firm of your choice understand the cause behind

this resistance. If they are the good strategic and creative thinkers you need them to be, chances are they can come up with creative ways of meeting this resistance.

Help your firm help you

Remember that point about communicating openly and honestly? These two go hand-in-hand. If you've found the right firm, then involve them in getting the rest of your team on the same page. This can include doing things like:

- Communicate and promote their merits internally to your team. If you're not sure how to do this, just ask!
- Keep everyone up-to-date on the status of the potential project.
- Be clear about who the decision makers and key influencers are as well as their motivations and possible reservations. The firm can address these individuals and their reservations directly.
- Help set up one-on-one interactions between your preferred firm and those decision makers who still are not convinced.
- Get your team in one place and give your preferred firm face time to tell their story and convince the rest of the team just as they have done with you.





Chapter 5: Why to avoid the RFP if you can

If your organization doesn't allow you free rein in selecting the best partner then you're likely facing purchasing limits or a required formal bid process.

For those with purchasing limits, there are still ways of avoiding the formal bid process to get your larger projects done more efficiently. But it's important to first understand why many formal bid processes, and particularly the RFP that's become a procurement default for so many organizations, are actually harmful to the creative process.

RFPs work fairly well in acquiring tangible goods such as the materials for a new building because these items can be compared like-for-like and the best deal can be selected. But creative services, or any professional services (lawyers, architects, accountants, etc.) for that matter, aren't physical commodities. They can't be compared like-for-like because while they may be similar, they are inherently different.

Information gathering and comparison is important in your selection of a partner for your next creative project, but doing so through an RFP is highly inefficient and won't produce the best results or the least costly solution.

Here's why.

RFPs = Longer project timelines

There was a time before the internet when information was more difficult to find, and it's possible to argue that RFPs were once the quickest way to collect the needed information to effectively evaluate creative partners.

But we live in an age where you have endless information at your fingertips. It takes far less time to do a little research on Google than to develop an RFP, send out that RFP, wait for responses, evaluate 20 different 50-page proposals, narrow that down to 3 finalists... then listen to 3 presentations from those finalists, select a winner, then wait 2 more weeks for your procurement office to get through the contract paperwork.

The RFP process is the epitome of inefficiency. If you're looking to work efficiently and save your team time, then avoid the headache of the RFP.

RFPs = Less value for your dollar

On top of the money your organization loses through wasted time in the RFP process, there are also unrecognized costs of doing business this way.

RFP responses, which can top out at well over 50 pages for creative services when including previous work samples or [spec work](#), take a lot of time to put together. While you'd be hard pressed to find a firm to admit it, there are situations when more time is spent on developing the RFP response than will actually be spent on your project. If you ask for spec work as opposed to previous work samples, then this is definitely the case. Asking for spec work is literally asking the responding firms to start working on your project for free before you've even awarded the contract.

Creative service firms that consistently obtain business through the RFP process have to make up the money they spend writing your proposal, so these additional costs typically get built into the cost of your project.

The bigger problem for you is that even firms who are really good at navigating the RFP process only land a small percentage of the jobs they write proposals for. This means that you aren't just paying a premium for the extra time spent up front on your project, but also the time spent developing proposals for projects your selected firm didn't win.

Business consultant, author, and university lecturer Cal Harrison estimates that the Canadian economy alone wastes \$5 billion dollars a year due to this RFP inefficiency. Watch his [3:30 minute video and see the math.](#)

As Harrison said in a [TedEx Talk](#) he gave in 2015, "As soon as you realize that your inefficient buying process is costing you money, then maybe there is incentive to change. The buyer benefits the most if we change this."

Additionally, if you happen to get a RFP response that proposes a lower than average estimated budget it shouldn't be viewed as a cost-saving opportunity. Rather, it should be a red flag to you that the firm is:

- A. Under-qualified
- B. Under-delivering
- C. Desperate for work, or
- D. All of the above

In any case, none of these scenarios are good if you are looking for the best final product.

RFPs = Limited creativity

When your organizational team sits down to develop an RFP, you are required by the very nature of the document to lay out the project scope and specifications, timeline, (hopefully) budget, and even set guidelines for the environment in which you want the project completed. If this project is for, say, a website redesign, by defining all these parameters you are essentially saying, “We are looking to hire a firm full of creative and qualified people to develop this thing for us, but we already know the solution to our problem and only need your skills—not your creativity—to implement it.”

By doing this you are not just limiting the creativity of the team you are hiring, you are also limiting the potential of the project itself, and therefore the value you get out of your investment. As [Stanford University Technology Strategist Zach Chandler](#) puts it:

“But what if our assumptions (laid out in the RFP) are not completely valid? What if we can’t see around all the corners, or see new possibilities of connecting with new methodologies or technologies? A pre-emptive spec locks you into your current best guess... and the web changes faster than that... By being open to the ideas of others, and stating the problem you want to solve rather than telling the vendor how to solve it for you, you may find that the outcome can be far better than you imagined.”

If you are required to use a formal bid process like Chandler is at Stanford University, then his [Expository Sketch approach](#) is a great alternative to an RFP.

RFPs = More hassle than they’re worth

They might not say it to your face, but this is how many great creative services firms feel. And it keeps many of them from seriously considering or responding to your RFP.

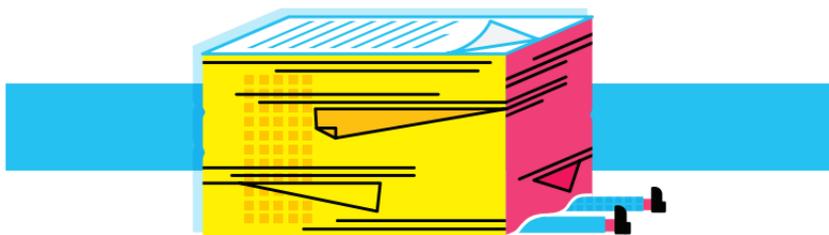
Don't take my word for it. This feeling prompted an advertising agency CEO [to write this piece for Advertising Age](#). It led to [this panel discussion at SXSW](#). And it frustrated a very talented designer and illustrator so much that he [penned this comic](#).

The inherent risk and cost of responding to an RFP a firm probably won't win, coupled with the annoyance of wasting time answering questions that are irrelevant to your project (Proof of insurance! Company history? Financial record of past projects!?) just to meet RFP requirements, leaves many creative services firms feeling that responding to RFPs is more of a hassle than it's worth.

This is a problem for you because if you are conducting a truly open RFP process, then this just eliminated some of the very best potential partners, and left you with the firms that are desperate enough for the business (and possibly for good reason) to put up with the frivolousness of the RFP.

Skip the RFP = More efficiency & better results

Creative people love to have real conversations about solving problems that engage their creativity. I don't know a single creative director or web developer who wouldn't give you an hour of their time to talk about a project you wanted to work on with their team. In fact, many totally geek out with excitement at the opportunity to do just that.





Chapter 6:
Purchasing limits?
No problem! Good firms
have solutions

If your organization has purchasing limits that include adequate budget for your project, most good firms have solutions to help you complete your larger project without exceeding them and forcing a formal bid process.

The method the MAC likes to recommend for clients with a purchasing limit that's smaller than the estimated cost of their project is to attack the project using a phased approach to development.

Think about it this way: All projects are made up of phases, which inherently make up a fraction of the total project cost. In fact, many RFPs ask creative service agencies to outline their process and project phases in the proposal response and estimate the cost of each phase.

“many RFPs ask creative service agencies to outline their process and project phases in the proposal response and estimate the cost of each phase”

So if a cost can be assigned to each phase, why not make these phases into separate, smaller projects?

This is the route more and more organizations and agencies are going when they begin to understand the downside of RFPs as they relate to creative services. Your \$50,000 website project can easily become four or five individual projects that each separately

fit within the purchasing limits set by your organization. When combined, these five projects equal one awesome website, and operating this way has allows you to work with the partner of your choice.

Every project is a little different, so make sure you are working with an expert firm that can help you navigate this process, lay out clear project phases, and set achievable timelines and goals.

An in-depth example

If you're now intrigued and want to know more, here is a closer look at how our example \$50,000 website project could be divided into smaller, less expensive projects.

Project/Phase 1: Discovery (\$5K)

Discovery is the research and strategic planning phase that starts any successful project. Sometimes overlooked by less experienced firms, this is often the most vital part of any project where you work with the partner firm to uncover needs, define scope and timeline, and establish measurable goals for the project.

If you're unfamiliar with discovery—or want to know more about how it can help you—check out these free, 8-page Discovery Guides for [branding](#) and [websites](#).

Project/Phase 2: Branding (\$10K)

If you are going to invest the time and money into developing an extensive online tool for client, customer, or donor engagement, you really should make sure your message and brand image are on point before implementing these elements into your new website.

Project/Phase 3: Content Development (\$5K)

Content development includes photography, illustrations, video, and written copy that combine to tell your organization's story.

Project/Phase 4: UI/UX Design (\$15K)

This phase includes information architecture, wireframing, and visual design mockups. It may overlap with content development and testing, depending on the schedule and nature of the project.

Project/Phase 5: Development & Testing (\$15K)

Developing the website can begin as the design phase approaches

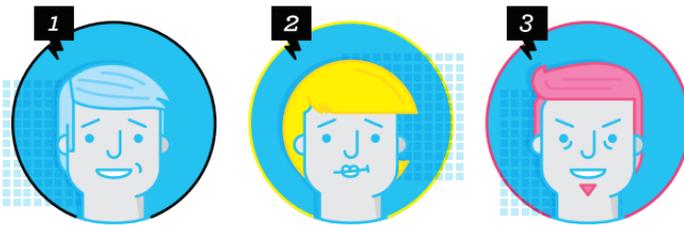
completion. A web developer takes the static, designed pages and codes them into a functional website. This phase is typically completed with user testing, bug fixing, and launching the site.

If your organization has even tighter purchasing limits than those described above—or if your project contains more extensive requirements and a more hefty budget—some agencies may even be willing to break the outlined phases into smaller chunks. For example, the development and user testing phase could potentially be broken into two separate phases.

Why your organization will love this new process

Our experience has shown that organizations who go to RFPs do so for one of three specific reasons:

- 1. The Well-Intentioned Organization:** This team just wants to do things by the book. They don't realize there is a better way or they aren't sure about the organization's policies.
- 2. The Traditional Organization:** This organization goes to RFP on every project regardless of the service or product they are seeking because that's just the way it's always been done. They like the familiarity of the RFP process.
- 3. The Evil Organization:** Yes, there are actually organizations who want FREE consulting to think out and scope the project for them so that they can take it in-house.



When presented properly, the idea of phased projects appeals to these organizations for the following reasons:

Well-Intentioned Organizations will appreciate the speed and simplicity with which they can now get the work done and will be excited to follow this new process.

Traditional Organizations also tend to be risk- and cost-averse organizations, meaning that phased projects will appeal to them because the step-by-step approach helps to eliminate unknown variables and unnecessary spending.

Evil Organizations: If this is your organization, please reconsider the moral compass guiding your business practices. While we won't ever convince you to ditch the RFP process, I'm sure you don't like being asked to do free work either.



Chapter 7: RFPs done right

Love 'em or hate 'em, RFPs are standard practice for many non-profit, higher education, and government organizations. If an RFP is your only option, there is a right way to conduct the process.

Developing the RFP

Here's how to develop an efficient RFP for professional services that gets you better results in less time.

- 1. Establish an effective team** who can get on the same page about the project goals. Honest feedback and effective collaboration is an essential part of working with a team. Differences of opinion can be helpful for honing in on the goals and needs of your project. But you must manage the fine line between constructive discussion and derailing disagreement. Don't be afraid to trim the fat from your team if you have a team member who disrupts the flow of the process.
- 2. Provide context for the project.** Once your team is established, you need to determine the key elements of your RFP. These are important to the responding firm's ability to develop an effective proposal that meets your organization where you are and provides effective solutions. These items include:
 - Budget
 - Schedule for RFP including submission deadlines
 - Contact information
 - Contextual background information
 - The problem to solve
 - Compensation terms

- Required qualifications (minimum and preferred)
- Evaluation criteria and process (including notification process)
- Legal/procedural rules

3. Determine your budget. Some people believe that keeping your project budget a secret from potential respondents helps you to get the best deal. But what it really does is hamper your ability to find the partner who is the best fit for your organization. If you hide your budget you will inevitably get responses with a wide variance in cost, experience, and ability. This means more time on your part to evaluate proposals that you'll never select because

“focus on identifying the firm who is giving you the most return on your investment”

of the cost or lack of fit. You will also have wasted money on the part of the firms developing those proposals just for you to throw them out without real consideration. And, be aware that many quality firms will not respond to RFPs with blind budgets. It's just not worth their time.

Clearly defining a budget—or at least a budget range—allows firms to decide if they can provide you with an effective solution to your problem within the given budget. Those that can will write proposals, and those that can't will self-select out which saves both parties time and energy.

After setting your budget, instead of focusing on getting the best deal (i.e., price), focus on getting the best value. In other words, focus on identifying the firm who is giving you the most return on your investment given the budget limitations by evaluating the combination of deliverables and quality of work they are offering to complete for you.

If you truly have an open-ended budget for your project, then your team should determine the value of this project to your organization.

- How important is it to have this problem solved?
- What role will a firm's particular areas of expertise play in solving these problems?
- Is the product or service you're looking for going to directly generate revenue for your company, such as an e-commerce website?

These are just a few examples, but all of these questions will help you to determine value and establish a budget. That budget will help all potential partners determine if they are really the right fit for you.

- 4. Determine respondent requirements.** Once you've clearly articulated your pieces of the RFP that help to educate the respondents about your organization and the particular project, it's now your turn to get specific with a few requirements for the responding firms. Define how much control your team wants over the creative process, and what you need to see from them to determine best fit.

Be clear about what you want from them, but be respectful of their time. We all know the old adage that "time is money" and RFP responses cost time to develop and evaluate. To be efficient, your goal should be to develop an RFP that is as efficient as possible while still sharing all the information a firm needs to respond. Requirements you should request include:

- Proposed statement of work, process, and project timeline
- Description of experience/qualifications - may include team biographies

- Relevant work samples—but don't ask for spec work
- References
- Legal requirements as dictated by local, state, or federal regulations
- Total project cost

Of all of these, the most important piece to consider here is whether you will outline the statement of work (i.e. how exactly you want a firm to solve your problem), the process, and the timeline for the project—or whether you will simply identify the problem

“when you identify your own problems and solutions you often bring preconceptions to the process that blind you to alternative solutions that may better serve your organization”

and let your applicants make recommendations for these other elements (the process, timeline, and ultimate deliverables) for you.

The benefit of the first option is that your team

has control of how you want the work done, and the deliverables you receive at the end of the process. The big negative is that when you identify your own problems and solutions you often bring preconceptions to the process that blind you to alternative solutions that may better serve your organization. This is magnified when dealing with technology because innovation is constantly happening, so you may not even be aware of other solutions that are available to you.

- 5. Gather any additional information needed.** Depending on your project you may consider asking a few additional questions beyond those outlined above. But don't ask for frivolous requirements, documentation or intrusive information that has no real bearing on your project.

Examples of these frivolous requirements and questions that the MAC team has seen in RFPs include (but are not limited to):

- Tell us about a challenge that you've faced and overcome.
- What project would you like to re-do?
- What's one question we should be asking and haven't?
- After providing a fixed cost bid and an estimate of hours needed to complete the project, please provide a breakdown of each individual team members estimated hours and hourly rate.
- Please provide project budgets and scope for similar projects you've completed for other clients.

Some of these questions are a waste of time for firms to respond to and your team to read the answers to. This only serves to distract from the only elements of the RFP that truly matter: the quality of the work, the process, the timeline, and the total proposed cost.

As for budgets, the only thing that should really matter is whether you think the work being done for you is worth the price the firm has placed on it. As with all businesses, as a firm does good work and grows, inevitably so will their internal overhead costs. It's unfair to the firm for your team to try to nickel-and-dime them for the same rate they charged a client five years before. If your team feels the quality of work being proposed is worth the price tag being attached, then the creative firm should have the freedom to distribute the funds internally however they see fit.

Soliciting proposals

Once you've written the RFP and have a solid foundational idea of what you are looking for, it's time to reach out to potential partners and solicit responses.

Some organizations require you to post an RFP publicly, but many allow you to distribute your RFP selectively to pre-qualified firms. While selective distribution requires some upfront research on your part to identify prospective partners that fit your project requirements, it also provides you with tighter control of the process, shortens the required evaluation process, and eliminates wasted time reviewing proposals from firms that aren't a good match.

If you've failed to scope the project correctly, or underestimated the project budget given the type of firm you'd like to work with, selectively soliciting bids will also help to identify these issues because your prospective partners will politely decline the invitation to respond.

If you can selectively distribute the RFP, your distribution list may include as few as 2–3 firms or as many as 20 depending on your objectives. The general rule is that if you don't consider the firm a serious contender, don't send them the RFP.

Make yourself available to answer questions

Depending on your organization, there may be ways in which your communication is legally limited after the RFP has been distributed. At the very least, you should conduct a pre-proposal conference call where firms can ask you clarifying questions to make sure their proposals are on point.

If you've limited the pool through selective distribution and you're legally allowed to, consider answering individual emails and phone calls. This will allow you to quickly and effectively answer questions, establish a relationship with potential partners, and get insight into their process and attention to detail.

Evaluation and selection

If you've done a good job outlining the RFP and soliciting proposals from prequalified firms, the evaluation process should be simple and efficient because you'll already have a narrow, focused field of responding firms and a clear guideline for how you want to evaluate the proposals.

When you're writing your RFP and establishing timelines, your team should also internally pre-schedule proposal evaluation meetings as part of this timeline. The last thing you want to do is receive proposal submissions and then spend two weeks trying to nail down your team's schedule to meet.

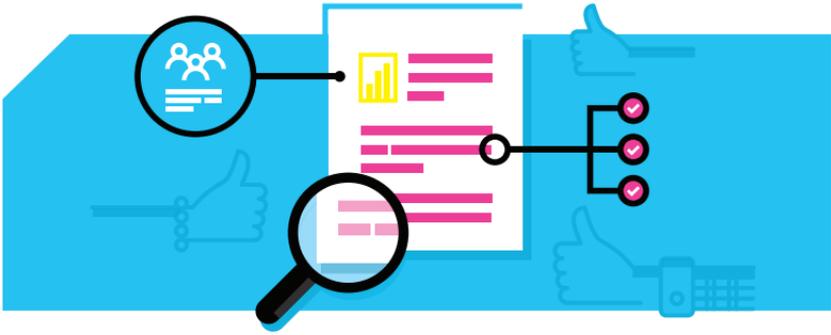
“the last thing you want to do is receive proposal submissions and then spend two weeks trying to nail down your team's schedule to meet”

Additionally, make sure you've established a clear scoring system that is being shared with the respondents as part of the RFP. For example, if your rubric uses a 100-point valuation process and 25 points can be awarded for price, then

make sure it is clear what price (or range) will earn the proposal the full 25 points and what will just earn it 15 (or zero) points. A vague scoring system makes it harder for your team to objectively evaluate proposals, and it makes it more difficult for firms to see what you really value in their response.

Successful selection committees

An odd number of selection committee members is also best in the event that the decision comes down to a majority vote. If you have an even number of committee members or a voting system that requires unanimous approval, make sure you have a predetermined tie-break procedure in place.



If you opted to distribute to a small field (less than 5) of prequalified firms, you may also consider asking the firms to present their proposals to you in person, rather than your team just reading them. This will allow you to ask follow-up questions and clarify aspects of the proposal if needed.

Finally, if you ask for references, use them. References can be extremely helpful in evaluating a firm's expertise and ability to form positive working relationships if these are key evaluation metrics for your team. If you have no intention of contacting the references, though, asking for previous work samples will go just as far to show prior work experience.

Final thoughts on the RFP

Ultimately you can only award your project to one firm. However, the firm you select will be your partner for months, if not years. Make sure you treat this relationship with care by responding to emails and phone calls in a timely manner and keeping them up-to-date as you go through the evaluation process.

When you've come to a decision, let all responding firms know of your choice and why you went that direction. While you may pass on a firm's proposal this time, they could be a great partner for you on a project down the road, and letting them know where they fell short will help them to improve for the next project they take on.



Find the right creative partner for you

Hiring a creative partner for any short- or long-term engagement can be a stressful and expensive process.

But it doesn't have to be.

When done right, hiring an expert creative firm will give you the chance to connect with other professionals who are just as excited as you are about completing your project on time, on budget, and with excellent results.

If you have the option, avoid formal bid processes and engage with prospective partners directly to get a better sense of their capabilities, culture, and excitement for your project.

When a formal process is required, create efficient bid requests that focus your respondent pool, ask only for the necessary information, and outline a clear and timely path to completion.



Additional resources

How To Hire An Advertising Agency

forbes.com/sites/keenanbeasley/2015/11/18/how-to-hire-an-advertising-agency/#5e1ec1563c7f

How To Pick The Best Digital Marketing Agency

forbes.com/sites/miketempleman/2015/09/01/how-to-pick-the-best-digital-marketing-agency/#3ad2071336e9

Managing Creative People and Teams

forbes.com/sites/victorlipman/2012/03/07/managing-creative-people-and-teams/#36bfb8b19204

No RFPS!

norfps.org

15 Reasons Why You Need An Ad Agency To Skyrocket Your Growth

reportgarden.com/2015/09/10/hire-ad-agency

18 Things Highly Creative People Do Differently

huffingtonpost.com/2014/03/04/creativity-habits_n_4859769.html



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madcollective.com