



# TIDAL WAVE OF RFPs: WILL YOU SINK OR SWIM?

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# SCENARIO 1

What could you/should you do when a prospect client as part of the RFP process requests the AMC to demonstrate their own financial stability? Some RFPs have gone as far as asking for a company financial statement.

## **FEEDBACK:**

- Do not share
- Bank reference letter to identify length of relationship
- Certificate of Good standing from the State
- Talk about accreditation
- Is the client a fit with our AMC? Or are they wondering if they are a big/small fish
- Have a letter from tax preparation firm validating firm is solvent

# SCENARIO 2

(usually related to a volunteer management run search committee)

In several recent AMCI RFP processes, the Search Committee volunteer leaders have contacted AMC references and asked specific questions that a volunteer leader likely would not know, and without having a conversation with their current AMC first. Examples include:

1. How does your AMC process data internally (workflow steps) as it relates to in house or third party AMS platform?
2. What types of training (internal or external) does your AMC provide to its personnel working as part of your client management team?
3. What is the method your AMC uses when determining overhead or non-direct expenses that may be billed to your association/organization on a flat or prorated basis?

In one case with a 2018 RFP that came through the AMCI platform, after finalists were selected and vetted during the spring of 2019, volunteer leaders (references) of the finalist AMCs were sent a list of 25 questions to respond to either by phone or email with a member of the Search Committee.

# SCENARIO 2

## FEEDBACK:

- AMCI put together a suggested list of questions for reference checks to provide the search committee
- Work with your own references on what kinds of questions are acceptable; coach them to redirect if needed.
- Sometimes search committees may research clients and call the Board members without knowledge to the AMC owner; nothing we can do about that.

# SCENARIO 3

(Generally arises when the current AMC working with the organization has what they believe to be high staff turnover on their client management team).

A prospect organization asks bidding or finalist AMCs to disclose how much they pay their client Executive Directors/Account Executives, Senior Meeting Planners, etc.?

## **FEEDBACK:**

- Do not disclose
- Becomes a trust factor in the relationship
- Provide employee retention statistics

# SCENARIO 4

When an RFP asks “What services does your AMC typically outsource (to whom and why)?” how do you respond?

## FEEDBACK:

- Legal services
- Web development
- Include as part of fee negotiation

# SCENARIO 5

Search process is too lengthy (again usually related to volunteer led searches).

Search Committee process includes an inordinate amount of “meetings/teleconferences” or “continual series of unlimited questions” with initial bidders or certainly, the finalist AMC’s.

## **FEEDBACK:**

- Red flag of micro-management
- Get out ahead of it and find out when they will cut-over; reverse engineer and present them with a timeline

# SCENARIO 6

Prospects that want the AMC to name the executive director or other staff that work directly on delivering their scope of work in their initial bid proposal. Sometimes the start date could be 6 months (or more) from the bidding period. How do you respond?

## **FEEDBACK:**

- List person as “for consideration”
- List the skill sets that you will look for
- Discuss type of people you hire
- General education on what an AMC provides – team approach
- Possibly identify another staff who could move up
- Put expiration date on the proposal
- Bring 2-3 associates to interview



# SCENARIO 7

AMC bidders have to discuss in detail how their AMC structures work flow so that the Executive Director has time to fulfill their duties as it relates to the client scope of work. Sometimes is interrelated to other staff concerns with current AMC. In a recent AMCI RFP search, the prospect organization wanted the AMC to share how it would “guarantee” that the ED had the capacity to full fill their specific duties. How do you respond?

## **FEEDBACK:**

- Reinforce services/team approach
- Clarify scope of work and job functions
- Build trust
- Establishing expectations – measurement v. fulfillment

# SCENARIO 8

The AMC holds a one-time phone call with all bidders simultaneously to answer questions, and/or all questions received are distributed to all bidders with the prospect's answers. What are the pros/cons of this method?

## **FEEDBACK:**

- The benefits are you know who else is bidding, and you may hear questions you hadn't thought to ask
- The drawbacks are you may not ask what you normally ask for risk of showing competitive advantage that you thought of the question

# HYBRID MODELS

## FEEDBACK:

- Education of AMC model to staff
- Onboarding process with the Board and staff person(s)
- Management team quarterly leadership calls with chief staff officer

# RFP STRUCTURE / SALES CYCLE

## FEEDBACK:

- What is the “why” behind the questions in the RFP?
- Attempt to have 1:1 conversations to find out
- Use AMCI to better educate search committee on RFP process and appropriate steps, timeline, etc.
- Put expiration date on your proposal



THANK YOU!