



# TIDAL WAVE OF RFPS:

*Are you ready to swim or will you sink?*

Responding to the latest trends in AMC RFPS

Friday, August 9, 2019

Facilitated by Jaime Nolan, CAE, CGT

Skip Rock Consulting



Jaime Nolan, CAE, CGT  
Skip Rock Consulting

# INTRODUCTIONS

- Your name, company and where you are located
- How many employees you have
- Number and types of clients (professional, trade, any industry niches)
- One question/observation you have about RFPs



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**Time is Up!**

**Get Ready to  
Share and Discuss**

# 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.

# 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 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.?

# SCENARIO 4

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

# 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.

# 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?

## 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?

## 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?

# ADDITIONAL TOPICS

*As time allows*

1. RFP Vetting Process
2. CEO Transitions/Retirements
3. Hybrid Models
4. Others?



THANK YOU!