

enterprising solutions

WITH ROBERT GROSSMAN

Writing and Responding to RFQs

More and more projects are issuing “Requests for Qualifications” (RFQs) to whittle down the number of consultants, integrators and even manufacturers they’re willing to consider on their project.

Kevin Kane, principal of the Kane Group, an owner’s representative and project management firm based in Grand Haven, Mich., frequently generates RFQs on behalf of clients. “The RFQ process creates consistency in the selection of consultants and other team members,” explains Kane. “It establishes at the onset of a project whether or not the people

you are considering are listening to you and processing what you are saying. It also allows you to focus on quality before focusing on price.”

If you’re on the end-user side of the equation, what should you look for to give you meaningful data when considering candidates? For folks responding to these RFQs, how much information is too much, and how can you keep from getting rejected before you’ve even had a chance to state your case? Let’s take a closer look.

Identify the 3 Project Types

Projects that involve significant contributions from outside parties are candidates for the RFQ process, although an RFQ may not always be needed. These types of projects are often divided into three categories:

Negotiated projects —

These occur when the end user has a preexisting relationship with the outside party, or is working with someone based on a referral. This option is usually the best for everyone as everything is a known quantity. Pricing can ensure a reasonable profit for the vendor while remaining competitive, and the level of quality is known. An RFQ does not generally help in this case, as the vendor selection has already been made.

Competitive bid projects —

These use a predetermined list of known vendors. Again, you’ve already narrowed the field and have essentially done what an RFQ seeks to do: Establish a short list of candidates that you feel will work well on your project.

Important questions to ask include a complete identification of the respondent. What type of company is it? Who owns the company? How long has it been around? Ask about the specific people you will be working with and their credentials, and determine whether or not they have the resources to support your project.



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Open bid projects — This is where numerous vendors are invited or eligible to submit bids. This can be for many reasons: A project may require open public bidding, numerous potential suppliers have expressed interest or there may be a lack of known good candidates for the work required. The last scenario often occurs for projects seeking a consultant where they were unhappy with the previous vendor or had not worked with a consultant in that particular discipline in the past.

Do Your Homework

A well-done RFQ starts with an explanation of the project and the goals you hope to accomplish. By including specific project goals, as well as a clear explanation of what will be expected of the respondent, you are able to weed out the individuals or firms that are not comfortable doing the type of work you are describing or that may feel they themselves lack the proper qualifications.

“The process of establishing these goals and determining how we will make decisions on candidates is an essential part of the RFQ process,” states Kane. “It forces you to create a decision-making body that works at the beginning of the project. And the more you do at the beginning of a project, the better things seem to work out at the end.”

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Resources can include more than just people — ask about the hardware, software and other facilities the company has at its disposal as it applies to your project. Remember, bigger is not always better; sometimes you are better off dealing with the owner of a small company than the latest new-hire at a larger, more established firm.

Find out about specific projects the prospective consultant has completed, including work that is similar in scope to the project you are considering. Projects should include references and sample work product — photographs, CAD drawings or other examples of the work. Try and keep an open mind with this one, unless you are certain you are going to get a lot of perfect candidates.

For example, if you are looking for a consultant who develops large airport security systems, you may find one that has done large systems and one who has done airports. Neither may be your perfect choice but they may be your only options, so consider carefully before ruling anyone out.

Make sure the consultants understand what you want. This can include asking for responses as to how they will handle a scenario you envision on your project. If you have any specific requirements, such as licensing, background checks, expertise and special knowledge, spell these out and ask for specific acknowledgement of these terms and conditions. You're not obligating them to anything at this point but you are establishing their willingness to be obligated if they make it to the next step.

Stay in the Running

If you are responding to one of these RFQs and have the necessary qualifications, staying in the running is surprisingly easy. It can often be summed up in two words: follow directions.

“We make very specific demands as to content and format to ask the question ‘are you listening to us.’” We’ll ask for X and expect to see X,” explains Kane, “but we often get other letters of the alphabet instead.” After all, if one of the things you’re looking for is a partner who will listen to you and respond to your specific needs, doesn’t it make sense to use the RFQ as a test?

In fact, there are legions of responses being thrown out for what may seem like silly reasons. Examples include: U.S. Postal Service solicitations sent in via another carrier when they specifically state USPS shipment or personal delivery; material arriving 5 minutes late and missing the deadline; complete disregard for the organizational structure that has been requested in the RFQ; and more pages than are permitted or the wrong number of copies.

All of these may represent silly mistakes, but the cost and attention of these projects usually means ruling out the candidate that makes these types of mistakes. “In life,” my fifth-grade teacher explained to me, “spelling counts.” Nowhere is this more appropriate than in the RFQ.

In the next “Enterprising Solutions,” we’ll take a look at what often happens after the RFQ — the interview. ■