

eGUIDE

HOW TO WRITE AN AV RFP TO GET THE BEST AND MOST ACCURATE RESPONSES

「*projection*」

What you'll find and learn
within these pages:

Current AV RFP landscape

- What's missing in today's RFPs
- How this impacts responses and your event

Writing an effective RFP

Key take-aways

We know: Writing (and managing) the Request for Proposal (RFP) process can be less than fun. It's time-consuming at best and tedious, confusing and unproductive at worst. And, after all the time and effort, the responses you receive might be all over the map, making it hard to come to an easy and clear decision.

But what if we told you it didn't have to be this way?

First, let's step back and look at the reasons you might put out an RFP.

- You want to make sure the price you're being charged by your current vendor is good market value.
- You are unhappy with your current vendor and want to find another (or at least consider your options).
- You belong to an organization that requires a review of the vendor landscape at regular intervals to ensure competitive pricing, fresh perspectives/ideas, etc.

While one of these reasons might be the catalyst for you to go the RFP route, it's important that you use the process to cultivate alignment across your event(s), including all your vendors (even those that service a wide variety of areas).

Ask yourself: What's your most important metric? For many, the answer is simple: An engaged audience that walks away inspired, fulfilled and looking forward to the next event. If that resonates with you, your RFP should not only not overlook that but should put it as the focus so you can ensure vendors are aligned and committed to working towards this important outcome.

The purpose of going out to bid should therefore focus on collecting a list of equipment and corresponding prices as well as asking the right questions to gather information that will give you a clear picture of the respondent as a company, its experience/expertise and the bottom line (i.e. pricing).

This eBook presents ways to do just that.

We've seen it all – from RFPs that ask all the right questions to those that leave wide, gaping holes – and have used that experience here to share what's missing in so many RFPs we receive, why that matters, and how to ensure all the right things are included in your next RFP so you can get responses that will inform the best decision for your organization.



"I don't see enough of the desired out-come in the RFPs we receive. For example, each organization – each event – has an experience they seek to deliver to their attendees. That experience is carried through and by every interaction, speaker and presentation; therefore, it's not just the equipment and costs associated with that equipment that matter. It's the people and company behind that equipment that not only brainstorm, create and execute with you, but interact with your attendees and speakers, shaping their experience."

Joe Faulder, Strategic Accounts, Marketing & Business Development, Projection

Current AV RFP landscape

A great way to assess the current landscape of vendors is through an RFP. Responses can (and should) give you a good sense of how vendors stack up with regards to things like costs, services, innovation and experience. While the benefits of finding the right vendor through the RFP process can drive positive results for your event(s), we see a large number that leave out much of the information that is necessary to delivering that kind of outcome.

So, what is missing from RFPs?

A lot, it turns out. In order for a vendor to provide an accurate quote (and more) for your event, they need very specific information and details about that event.

Here's a checklist of the things we often see missing from RFPs today, but are critical to providing an accurate and comprehensive response.

- ☐ **Event schedule**
- ☐ **Room specs, including how long rooms are available (for set-up, tear-down, event)**
 - Including, do rooms have 24-hour holds? (If the hotel, for example, is planning to use the room for another event that day, labor costs will increase dramatically, as there will be multiple tear-downs and set-ups.)
- ☐ **Equipment specs, including rental time (which should include set-up)**
- ☐ **Pictures and diagrams from most recent event**
- ☐ **Program from most recent event**
- ☐ **Itemized list of equipment from previous event**
 - Including the equipment schedule, from load-in to load-out
- ☐ **Size of exhibit hall, number of exhibitors and historically how many exhibitors order audio-visual services/equipment from you're AV partner**
- ☐ **Any ancillary (or ICW/in-conjunction-with) meetings that may be additional revenue opportunities that the bidding companies can use to consider what pricing structure to offer (e.g., based on exhibitor and ancillary opportunities, the bidding companies may be more willing/able to structure a deeper discount for the main event)**
- ☐ **Storage availability and accessibility (e.g., if event takes place in multiple locations, can equipment be stored in each, or will it have to be transported back and forth?)**
- ☐ **Existing agreements (i.e. contracts/scopes-of-service) with the facility that would directly impact an outside AV provider**
- ☐ **Company (i.e. vendor) information**
 - Profile
 - History
 - Vision/mission/values
 - Owned/warehoused equipment
- ☐ **Desired attendee experience**

Current AV RFP landscape cont.

Consider this example: A few AV vendors receive and open an RFP that doesn't include a detailed schedule – of the set, event, breakdown. Vendor A quotes labor and equipment according to the information provided and assumes they can get into the rooms to set the day before the event. Vendor B assumes the set can only take place the day-of the event and quotes accordingly. Vendor C is the incumbent [vendor] whose quote is the highest because they have institutional knowledge about the event, including full equipment lists, schedules, staffing needs, etc. You go with Vendor B because their quote is much lower than the others. As you start planning the event – and schedule, equipment and staffing needs become clearer – you learn your AV costs are going to increase exponentially and the allocated budget is no longer applicable.

This is one over-simplified, but very common, example. The mistaken or overlooked exclusion of a single detail may not have a dramatic impact on the responses and your ability to glean a clear picture of the vendor landscape; but a few of them can drastically affect the end result (both in terms of the proposals you receive as well as the event itself). If information is left out, vendors guess and make predictions about what an event needs, which can lead to wildly different quotes and responses. This makes not only the decision-making process more difficult but can also lead to a budget that gets thrown out of whack once those details are revealed down the line, closer to the event.

Current AV RFP landscape cont.

American Express Meetings & Events focuses on the importance of focusing on the “why” of an event in a new [report](#).

Les Goldberg, CEO Entertainment Technology Partners, LMG, argues that it is important to learn more about who is behind a company when evaluating a partner. “If you are looking for a long-term staging partner, it has become critical in today’s industry environment to learn more about who is behind the company you will be working with on your next show. Ask about ownership, the qualifications of the leadership team, and look for longevity. Ask yourself, would you rather work with a company that is trying to exceed the expectations of their clients or a board of directors?” You can find more on his perspective [here](#).

One of the things that doesn’t lend itself as easily to a checklist of RFP items is the attendee experience. While most organizations have a very clear picture of the experience they want attendees at their events to have, that doesn’t often make its way into the RFP process (and, quite frankly, is often left out of the planning process altogether). Why does this matter to your AV partner? As with all of your partners, the company you choose as your AV vendor will be responsible for delivering that experience – through the technology, presentation management, branding displays, etc. Without a clear picture and understanding of that desired experience, they are operating, metaphorically, with one hand tied behind their backs.

Without this, they are both unable to make recommendations for enhanced or more streamlined experiences when planning for/designing the event, but also unable – during the RFP/proposal process – to provide an accurate response related to the tools, talent and time needed to deliver that experience. For you, that could mean two wildly different budgets – one that’s bare-boned, in response to the RFP, and a second that more accurately represents the event and what’s needed to pull it off successfully. And, as you may have already experienced with previous events, the latter is often not clear until after the event when everything is tallied.

The impact of an incomplete RFP

The bottom line: When an RFP isn't crystal clear, you are likely to receive responses that are all over the map. In reality, at least from a price standpoint, vendors should be within a certain range of each other; so, if you notice a gaping variance in price, those vendors likely responded to the RFP quite differently (e.g., with different technology or alternate views on the amount of labor necessary). That is likely to make the job of deciphering and comparing those responses more daunting, and less "scientific," as it's harder to compare apples to apples.

Beyond the responses (and the added time to decipher them), an incomplete RFP often leads to "emergencies" later on. If your vendor bids and plans on technology and labor based on an incomplete picture of the event, as the planning takes place and event kicks off, there are likely going to be gaps identified – such as labor missing or technology not accounted for. That can not only impact your bottom line but can definitely impact the seamlessness of the show – and even the attendee experience. The more detail provided and planned for upfront, the more seamless your event is going to be.

Writing an effective RFP

Based on our experience responding to RFPs, working as a strategic partner to deliver personalized expertise to our clients and servicing dozens of events each year, we know the more information you provide about the scenario a vendor will be walking into, the more accurate the responses will be, and, quite often, the more successful the event.

We recommend following the path laid out below as you look to develop your next RFP.

Define and capture the experience you want attendees to have.

Determine: Are they having it now? If so, what goes into ensuring that? If not, what's missing? Maybe you want a strategic partner who will execute on an already successful and established vision, or perhaps you need a partner who can help design and execute. Understanding both what you want to achieve and the role a partner can play can lead not only to better, more thorough responses to your RFP, but ultimately, a more successful event.

If/when possible, pull in your current vendor(s).

They, more than anyone, will know your event inside and out and the many nuances related to AV and technology needs. Many times, your vendor will provide things not even you know about – things that don't end up in your final invoice. Therefore, for an accurate apples-to-apples comparison, getting their input on labor and equipment needs can be crucial to this process. (Obviously in some instances this won't be possible, but where it is, it can streamline the process and cultivate the most accurate responses.)

For example, once you develop a list of equipment, have your current vendor review it to make sure it includes what you actually use, including comps. In our experience, many clients list the same specs every year but adjustments have been made without formal notice (e.g., changing standard to high definition).

Writing an effective RFP cont.

Look at last year's event and use it as a baseline.

Whether you intend to add to what was done or keep it pretty much the same, this provides the most accurate view for anyone to provide pricing on technology, tools and labor. It also gives them a good picture of how the technology is used, and, when combined with your vision for attendee experience, can help paint a better picture so they can provide the best, most strategic response.

- Pull the itemized bill and blur the prices
- Include pictures, floor plans, meeting grids, program and schedule
- When including last year's event schedule, it's important to indicate changes for the upcoming year(s), as this may impact the quote for labor and/or equipment.

Look ahead to the event for which you are sourcing.

You should expect the companies that respond to the RFP to bid using the rates and conditions for the new city – not the previous one – which may impact costs significantly. For example, labor in one city is likely very different than that in another. Ask vendors to provide taxes that will be associated with equipment and labor bills, as some cities require tax on equipment rentals while others require tax on both equipment and labor; this can end up as a big line item in your budget.

Identify and list what restrictions the AV person might confront at facilities in question. For example, if you normally use the in-house company for microphones and audio, it's best to state that so the responders can quote them separately (and, therefore, more accurately).

If someone in your organization signed a contract or scope-of-service with a facility that included clauses related to the in-house AV team (e.g., rigging, audio, power, Internet), let the bidding companies know in advance so they can plan accordingly.

Figure out what kind of company you want to partner with (and if that matters). Develop questions that aim to understand:

- Who is behind the company
- How they work with clients
- How they onboard new clients
- What clients say about their work, product, technicians (both in-house and freelance)
- What the planning process looks like
- Approach to client communication
- Team experience and company turn-over

Key take-aways

TIP

If a vendor provides a discount, be sure to ask what the discount applies to/where the discount structure starts and ends (e.g., if the discount is on equipment, it might only be applied to the equipment they own, which excludes rental equipment)

Each event – and the organization/association putting it on – is unique, and the RFP should reflect that. But, that doesn't mean it has to be an overly tedious process. With the right resources and strategy, you can develop an RFP that is well-positioned to return the most accurate picture of the vendor landscape.

Ready to get started on writing that killer RFP? Here's a wrap-up of things to keep in mind:

1. Determine and define what kind of partner you want
2. Get your current AV vendor involved
3. Gather and include as much information from previous year's event(s) as possible (use the aforementioned checklist as a resource!)
4. Determine and communicate the experience you want your attendees to have
5. Seek information about each vendor beyond client testimonials – history, values, vision, how they do business, etc.
6. Be clear on your expectations for the vendor (this can/should include things like pre-show time commitment, success metrics, technician etiquette, communication styles/preferences)
7. Get specific. Some comprehensive RFPs have asked for a full list of a vendor's inventory to demonstrate flexibility and size (e.g., owning equipment vs. having to rent)

Consider sourcing beyond a one-year contract. When searching for a new vendor for a one-year relationship only, you risk consistency of staffing and guaranteed/discounted pricing. Rather, it might be worth considering a 3-year contract with an "with cause" out clause.

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No matter what kind of event you are planning or vendor you're looking for, the RFP is the first step in ensuring a successful meeting and partnership. By laying a solid foundation, the process not only becomes more seamless, but it delivers a more equal and comprehensive overview of the landscape.

ADDITIONAL READING

While these articles go beyond writing an RFP, we find them helpful and insightful as it relates to defining and designing the overall event experience. Hopefully you will, too!

[The 3 Stages of Designing an Event Experience Attendees Love](#)

[How to Nail the Attendee Experience Before Your Event](#)

[American Express M&E Research: How Branding Principles Can Guide Your Event Design](#)

[9 Smart Tips for Creating Authentic Events](#)

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