



M3 B2B Strategy, LLC
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Strategic Planning RFP Tips

Best Practices for Crafting an Effective Request for Proposal

Strategic planning is a critical process for any organization seeking to achieve long-term goals and navigate the complexities of the business environment. Crafting a Request for Proposal (RFP) for strategic planning services is an essential step in securing expertise and guidance from external consultants. Below are some tips to help create a compelling and effective RFP.

Define Your Objectives Clearly

Before drafting your RFP, it's crucial to have a solid understanding of what you aim to achieve with strategic planning. Outline your organization's goals, priorities, and specific areas where you need assistance. A clear definition of objectives will help potential consultants understand your needs and tailor their proposals accordingly.

Include Comprehensive Background Information

Providing detailed background information about your organization is essential. Include your mission, vision, values, current strategies, and any relevant historical context. This information will help consultants gain a deeper understanding of your organization and its strategic direction.

Specify the Scope of Work

Be explicit about the scope of work expected from the consultants. Outline the key tasks, deliverables, and timelines associated with the strategic planning process. Clear specifications regarding the scope will ensure that proposals are aligned with your expectations and requirements.



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Detail Evaluation Criteria

Specify the criteria you will use to evaluate the proposals. Common criteria include experience, expertise, methodology, cost, and references. Providing these criteria upfront allows consultants to focus on the aspects most important to you, facilitating a smoother evaluation process.

Highlight Essential Qualifications

State the qualifications and experience you expect from potential consultants. This includes industry experience, strategic planning expertise, and familiarity with similar organizations. By highlighting essential qualifications, you can attract the most suitable proposals.

Outline Proposal Requirements

Clearly outline the structure and format you expect for the proposals. Specify any mandatory sections, such as an executive summary, methodology, team bios, and budget estimates. Clear proposal requirements help ensure consistency and ease of comparison during the evaluation process.

Set a Realistic Budget

Communicate your budget constraints or expectations openly. Providing a budget range can help consultants tailor their proposals to meet your financial parameters while still offering the best possible service.

Communicate Timeline Expectations

Include your timeline expectations for the entire RFP process, from the release date to the deadline for proposal submission, evaluation period, and final decision. A well-defined timeline helps manage expectations and ensures timely responses from consultants.



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Encourage Questions and Clarifications

Allow potential consultants to ask questions and seek clarifications regarding the RFP. Providing a designated contact person and a time frame for queries can prevent misunderstandings and ensure that proposals are well-informed.

Promote Transparency and Fairness

Ensure that the RFP process is transparent and fair. Provide equal access to information and opportunities for all consultants. Transparency fosters trust and encourages high-quality, competitive proposals.

Review and Refine Your RFP

Before issuing the RFP, review and refine it to ensure clarity, completeness, and coherence. Seek feedback from internal stakeholders or advisors to identify areas for improvement. A well-crafted RFP is likely to attract superior proposals.

Conclusion

Crafting an effective RFP for strategic planning services is a nuanced process that requires careful consideration and attention to detail. By defining objectives clearly, providing comprehensive background information, specifying the scope of work, detailing evaluation criteria, highlighting essential qualifications, outlining proposal requirements, setting a realistic budget, communicating timeline expectations, encouraging questions, promoting transparency, and reviewing the document thoroughly, you can ensure the success of your strategic planning initiative.

Call us at 314.422.5651 or schedule a discovery meeting here:
<https://calendly.com/michael-martin-m3b2bstrategy/30min>