



THE NEW ELLIS GROUP

# Monday Monday

*Connecting the Dots with Karen Kaplowitz*



*Helping you create and reinforce the habits of successful career building, gleaned from my work as a business development strategist, trainer and coach.*

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**Successful Responses to RFPs: Part 1.** After courting a client for a year, you have received an invitation from the general counsel to respond to a Request for Proposal [RFP]. First, celebrate and let your colleagues know that your marketing efforts have paid off. Then, evaluate whether you actually want to participate.

- Is it the right work? If you are looking for bet the company litigation and the RFP covers low-rate commodity cases, the answer may be no.
- Is the RFP bona fide? Some RFPs are a formality with an existing firm's having the inside track.
- Do you have timely access to sufficient information to prepare a credible proposal? You need to know why the company is bidding out the work; which firms have done the work in the past; and what the company's objectives are. Are they looking for better results or just lower costs, for example?

If the fit is wrong, do not respond just because it is your first invitation. Bow out gracefully, not by delaying or ignoring the RFP altogether. Use the occasion to keep your name in front of the client and promote getting the right kind of work in the future.

**Example:** If the work is attractive, move quickly to respond to the RFP. Your first three calls are:

- To check conflicts.
- To thank your client contact and set a time to debrief on the RFP.
- To your marketing and finance departments for help.

From the client, you need information about the risks, complexity and historical costs of similar work. You do not want to over-estimate your proposed costs because you erroneously assume the work has the greatest potential complexity. From your firm's finance people, you need historical cost data on your firm's actual experiences in similar cases, to protect the firm and to create a credible bid.

Next, identify which lawyers to invite to help prepare a response and make a pitch to the client. Circulating the RFP will help you select the lawyers with the right expertise, hunger and team spirit.

Your response must be client-focused, reflecting an understanding of the client's problems, not boilerplate about your law firm or your experience. But your response does not have to lay out the whole strategy you would develop if selected. Not only are you not being paid to give detailed legal advice, but given your limited information, it may even be presumptuous for you or your competitors to lay out a legal strategy.

Are you ready to use RFPs to deepen your knowledge of your prospects and your relationships with them, both when you decline to participate and when you compete? On Monday, February 11, 2008, **RFPs: Part 2** will provide insights from the client side on how your responses are evaluated.