

5 Steps in Creating and Executing a Successful RFP

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The Advantages of the RFP Approach

As companies pursue new business partners for their facility maintenance needs, one common way to find the best partnership is to launch a Request for Proposal (RFP) format.

Why an RFP?

By utilizing an RFP strategy, companies are able to accomplish multiple tasks through a single consolidated process:

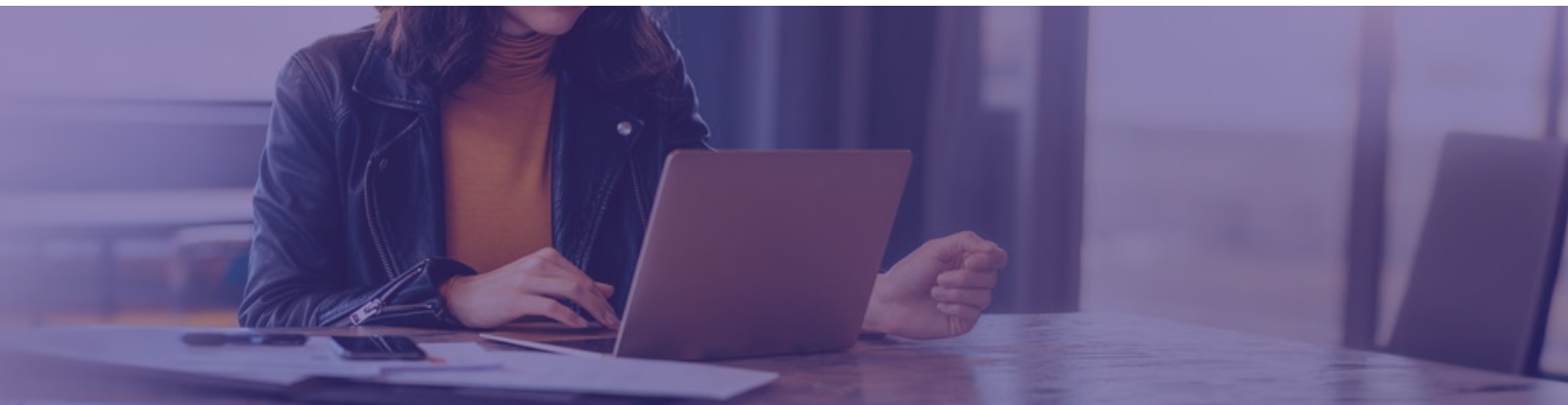
- Evaluate multiple potential candidates for services
- Gather company, services, and pricing information
- Prioritize their time in working with the right service providers
- Gauge the responsiveness and thoroughness of participants
- Find the best potential fit for their facility maintenance goals
- Understand what is possible in their maintenance program and adjust where needed

An RFP is indeed strategic for all of the reasons outlined above, but without some guardrails and actual process, it can quickly become difficult to manage and make a decision — defeating the purpose of an RFP altogether.

Ultimately, the creation of a successful RFP requires multiple steps in order to ensure your company finds the best service provider for your specific needs.

In this guide, we'll take a look at five steps that can help you to construct the ideal RFP that caters to what you are looking for in a facility maintenance service partnership.

Let's get started.



1. Establishing the Ideal Prequalification Process

In advance of gathering pricing, rates, and number crunching, it's important to gather information on a company's background, industry experience, and specialty areas.

Below are a few steps to help you start off on the right foot:

1. First, carefully consider what you're looking to achieve with your RFP. Are you looking for greater coverage for your locations? Do you need more capabilities and services from your chosen partner? Is a current partner failing its obligations? Is cost your primary focus?

2. Create a Prequalification Questionnaire. This is designed to help you learn about companies whose strengths best fit your service needs and goals. In addition to standard questions about their business, consider asking framing questions around your specific needs/goals. (E.g. "Describe how you help your clients with annual planning and strategy.")

3. Research potential partners and build your list. Build your list and use it when the time comes to distribute your questionnaire. Aim to build a strong list — by sending the questionnaire to a large group of companies, you can then evaluate their responses and narrow down your favorite candidates — to whom you will include in the actual RFP.

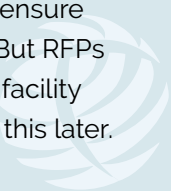


4. Consider automation. If you have the technology available, it may be worth building an automated workflow that weeds out responses based on responses received. This will help you and/or your team to stay focused on normal business tasks without being inundated with responses that don't require your time anyway.

5. Distribute the questionnaire. This can of course be done in a variety of ways, but ensure the prequalification questionnaires are distributed to your complete list in a timely fashion. You'll likely begin receiving responses or questions right away. If you've leveraged automation, this will hopefully be reduced thanks to the removal of those who don't fit.

6. Close the questionnaire and evaluate the finalists. Once you have a sufficient number of responses, you can begin to evaluate the final list that you'll use for the actual RFP process.

Is all of this really necessary? If you're going to navigate a successful RFP, it's important to be proactive and ensure you're using your time wisely. But RFPs aren't the only way to a strong facility maintenance partner. More on this later.



2. Pinpointing Objectives in the RFP

When designing your RFP, be detailed, precise, and forthcoming with your expectations — and what your company is looking to achieve.

Your RFP Serves a Purpose

It's important to remember that your RFP should serve your strategic goals in seeking and retaining a new facilities maintenance partner.

Below are some common program improvements that organizations often seek via the RFP process:

- Better program pricing
- A larger vendor pool
- Asset management
- Elite customer service
- Long-term partnerships
- Turnkey services
- In-depth reporting
- Strategic planning support
- Budgeting assistance
- Years of industry experience

How to Integrate Your Goals

To ensure your RFP does in fact meet your organization's goals and to maximize your time in managing it, first take a strong look at your program objectives and identify the areas in which you would like to see improved results.

With that information identified, you can then gear the RFP to fit your goals. Note that your goals should be communicated in the language of the RFP so that the companies who participate can speak to their capabilities and support in the areas that matter most to you.

3. Setting Service Expectations

It's important to gather information on what service providers can do for you, but be sure to specify your own service specifications.

You Have Goals to Hit

Your organization still has processes to follow, expectations from locations you support, and other needs that must be met consistently.

Your RFP should communicate what these expectations are so that you can have full confidence in knowing that the partner(s) you choose will help you meet them.

Expectation Examples

- What is the length of the service contract?
- How many sites will receive service?
- What are service standards?
- What are communication expectations?
- What system will be used for reporting information?
- Are there specific goals for asset management?
- Will you be selecting multiple service providers? Just one?

Because every business operates in its own unique manner and has different staff dedicated to specific responsibilities, it's essential that an RFP is designed to find a service provider who would work best with your facility maintenance personnel or even customize their services to meet your needs.



4. Establishing a Specific RFP Schedule and Timeline

Nothing is worse for a service provider than dedicating a tremendous amount of time and effort into an RFP — but having no idea or timeline for service expectations.

Establish Internal RFP Guidelines

When launching an RFP, it's critical to set a specific timeframe for determining the results of the RFP process.

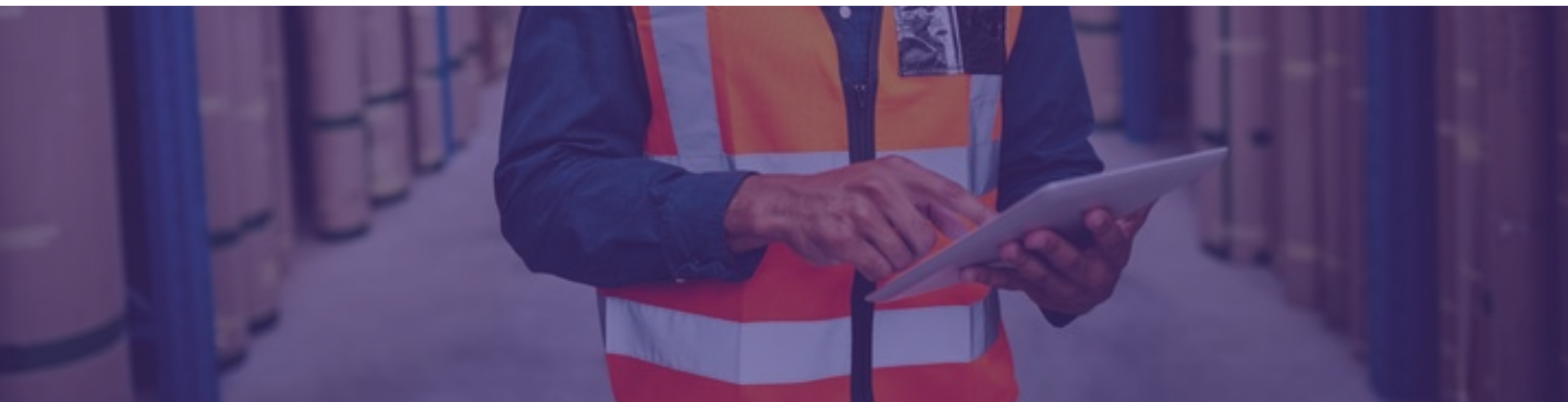
If you're going to ask prospective partners to undertake the workload of an RFP in pursuit of your business, extend them the courtesy of communicating what happens throughout the process.

The first step here is determining what this looks like internally. Facility leaders, financial leaders, and anyone else involved should meet to establish and agree upon these guidelines.

Key Considerations

- Do you plan to meet with vendors before you make your final decision?
- On what date would you like services to begin?
- Would you like the vendor to establish a service contract for your review, before you make your selection?
- How long will vendors have to submit responses?
- Who can vendors contact with questions regarding the RFP? How should they contact them?

Formalizing these and then communicating them to RFP participants will go a long way in helping companies feel comfortable in moving forward — and may help increase the number of organizations that do.



5. Follow-Up and Evaluation of Performance

Ensure that the partner you've selected is fulfilling their promises and meeting their obligations.

At the 6-Month Mark

Let's pretend you've selected your facility asset management partner and have utilized their service(s) for six months.

At this point, it's appropriate — and vital — to ensure expectations are being met and you have the assurance that you selected the best provider for your company.

Below are some suggested questions and considerations for you and any other leaders to evaluate once you've reached this point in the partner relationship.

What to Evaluate

- Have services, communication, and follow-up met expectations?
- If the company promised in-depth reporting and face-to-face meetings, has a meeting been scheduled to have them visit your headquarters and conduct a business review?
- Is pricing in line with the way it was outlined in the RFP?
- Is the vendor providing the asset management information you need (which was outlined and required in the RFP)?

These are just a few considerations that are worth evaluating at the six-month mark. You may have more based on the needs of your organization.

What matters most is ensuring that the company you've chosen to work with is living up to what they've promised.

Is an RFP the Best Way to Go?

Consider another approach when seeking a reliable facility asset management partner — and save yourself some time and effort along the way.

We hope the information in this overview is helpful as you consider your approach to developing an RFP for facility asset management. Of course, an RFP is not the only way that your organization can identify and work with a reliable partner.

RFPs can certainly serve the strategic purposes outlined in this document, but as you likely discerned, they're a significant undertaking in terms of time and resources.

There is risk in developing an RFP as well in that you may invest all of that time only to find that none of the companies selected truly meet your needs.

At CLS Facility Services, we prefer the relationship approach. Here's why.

We are able to build a meaningful partnership with you and your team that is intended to keep us working together for years to come. No extensive RFP process — just a partner you know and trust at all times. You'll have a dedicated team to reach out to for everything from program status and billing questions to emergency services (a team with an average tenure of more than 12 years!).

We establish trust from the start. You'll get to know us, understand our capabilities, and learn how we add value. This ensures you know what you're getting.

Our programs are truly customizable. From preventive maintenance programs for virtually every asset to specific maintenance offerings, we'll build a program that works for you, with the data and service to back it up.

Carefully consider whether an RFP process is right for you. It's a significant undertaking, and one that you may be able to avoid by working directly with a relationship-focused partner instead.



About CLS Facility Services

CLS Facility Services is a nationwide facility asset management organization that partners with service providers across multiple disciplines and industries.

We pride ourselves on the technical expertise of our service professionals, many of whom have been with us for more than a decade. Our team has a comprehensive knowledge of HVAC/R preventive maintenance, turnkey LED retrofits, lighting and electrical maintenance, and other services that can help you maximize performance and savings.

As an aggregator, we do not self-perform our maintenance services. Instead, **we partner with commercial service vendors** across the country to ensure you have the right support exactly where your facilities are located. This helps consolidate service vendors for your team and reduces your administrative workload. **Every vendor has been rigorously vetted** and has an average relationship length of more than 12 years — giving you peace of mind in knowing that your facility assets are in good hands.

Here's why you should work with us for your facility asset management needs:

- Complete maintenance coverage across the U.S.
- Asset maintenance support for 50 to 500 locations
- Experienced and service-focused account team
- Ability to work on multiple work order systems
- Accessible online asset management portal
- We build a complete list of all lighting/electrical assets
- CapEx budgeting and strategic planning support
- Your account manager is your emergency contact
- Extensive capabilities beyond LED retrofits and maintenance
- Relentless focus on customer service at all times

Connect with us today to learn more about our capabilities for your organization.