



Welcome to the CIO Hour!

November 2021

RFP Tips & Tricks

The CIO Hour

- Tackling the problems and questions that are on your mind with real-world technology advice
- Featuring experts in their field with decades of real-world experience
- Usually the first or second Thursday of every month

Visit www.theCIOHour.com for upcoming topics and events.

Ground rules...

- No question is off limits!
- If the question is too specific to a particular situation, we may defer it but are happy to talk to you offline or after the event.
- This is a safe space, but we understand if you wish to remain anonymous.
- Each session is worth 1 CAE credit – details to claim emailed tomorrow 

Agenda

- In the News – A few highlights that might interest you
- Fast 15 min – Introduction to the topic of the month
- Q & A – 30 min – Discussion with our experts and taking your questions

Today's Panel



ANA LODEN

Sr. Account Executive, MemberSuite
aloden@membersuite.com | 678.606.0316 x106

Ana Loden has worked for MemberSuite since 2012. She specializes in assisting non-profits with AMS selections. With 5 years of previous experience in the engagement industry, it was a natural fit to work with associations. She's a graduate of Auburn University, lives in Atlanta, Ga with her husband and Siberian Husky.



JAMES C. MARQUIS

Chief Information Officer, 501Works
marquis@501works.com | 703.459.9779

James C. Marquis is a seasoned senior executive with more than 30 years of experience working in technology with a wide variety of associations and nonprofits. James' work experience includes serving as CIO for a large medical association, CEO of a technology consulting organization and senior roles in product development and business consulting for for-profit and nonprofit clients. He also has designed and built multiple Internet-based business applications including Mojo Middleware™.



BRYAN CLARK

Director of Business Development, Matrix Group
bclark@matrixgroup.net | 703.838.9777 x3016

Bryan Clark is the Director of Business Development at Matrix Group. With over 20 years of customer service, sales, and solutioning under his belt, Bryan is a master of developing relationships with our clients and developing strategic solutions that will drive growth and long-term value. Bryan holds a BS in Marketing from the University of Evansville, where he also played Baseball on the collegiate team.



JAMES CHEN

President, MemberPlex
jchen@aurachicago.com | 312.479.6211

James Chen, Founder and CEO of MemberPlex and Aura Innovative Technology, has more than 20 years of experience working with associations supporting a variety of end-to-end projects to optimize technology to support their missions. James technical acumen and consultative approach give him a unique ability to lean on industry leading practices while delivering agile and personalized solutions.

In the News

1. How Meta is Meta?

<https://about.fb.com/news/2021/10/facebook-company-is-now-meta/>

Merriam-Webster dictionary defines the word “meta” as follows:
“Showing or suggesting an explicit awareness of itself or oneself as a member of its category.”

2. Apple Debuts \$19 Cleaning Cloth (Delivery 10 – 12 Weeks out!)

<https://www.cnet.com/tech/mobile/apples-19-polishing-cloth-supports-years-of-devices-is-on-backorder/>

3. Microsoft Seeking to Cut Cyber Security Workforce Gap

<https://www.cnbc.com/2021/10/28/microsoft-aims-to-cut-cybersecurity-workforce-shortage-in-half-by-2025.html>

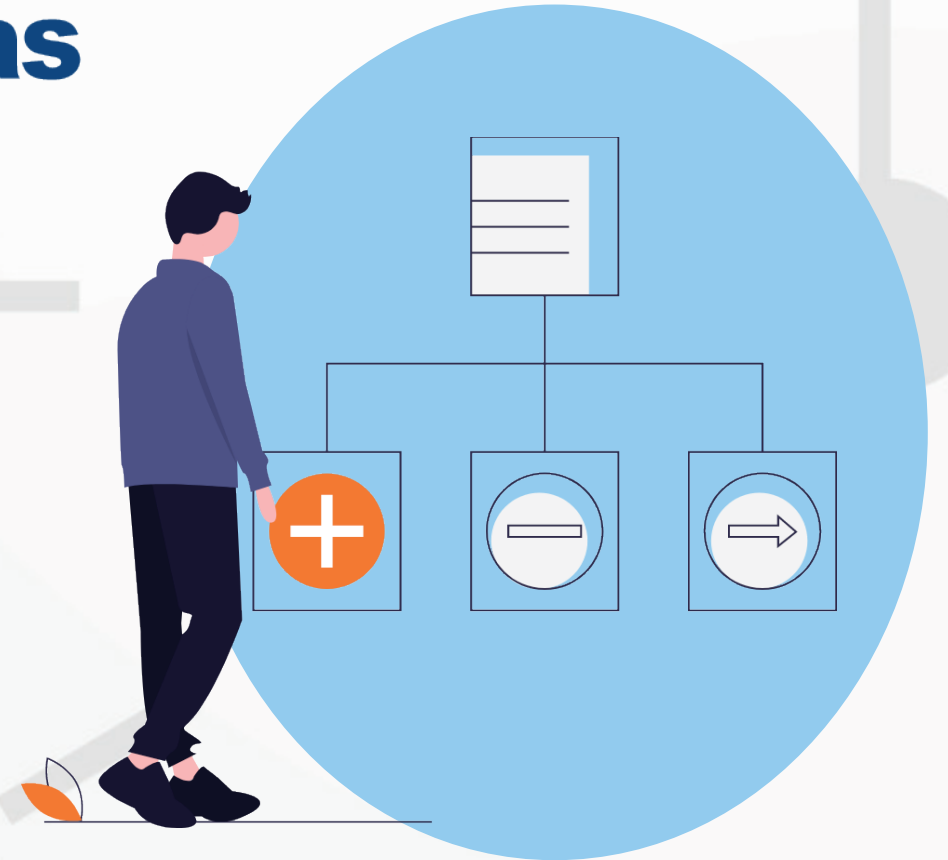


Today's Topic:

RFP Tips & Tricks

Craft Your RFP – Key Areas

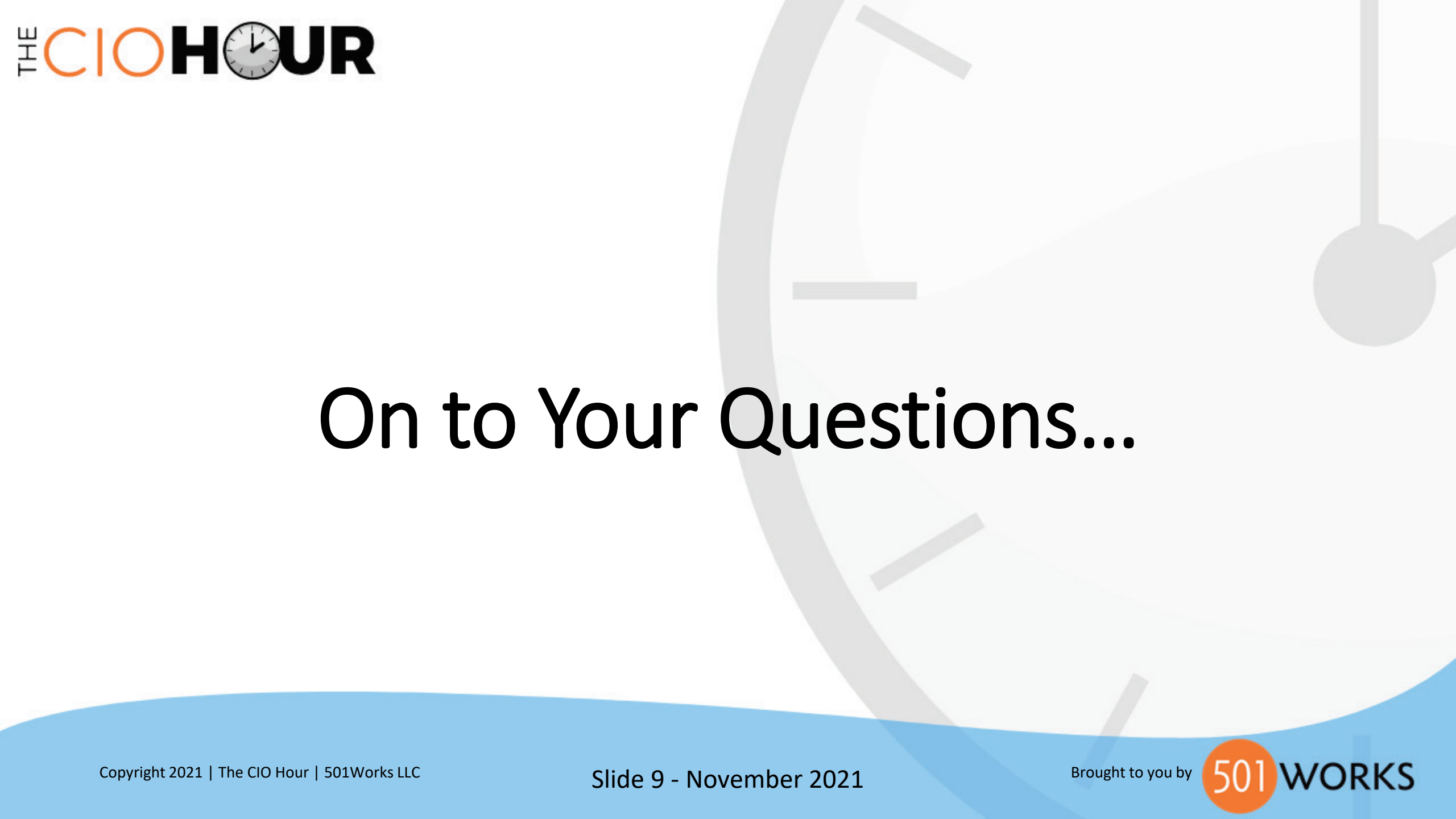
1. Organizational Overview and Background
2. Project Goals
3. Project Requirements (Your Needs)
4. Vendor / Platform Information Request
5. Proposal Response Format
6. Communication Rules
7. Evaluation Criteria and Schedule
8. Legal Requirements



RFPs – By the Numbers

1. Organizations respond to 150 RFPs on average per year
2. 72% of teams perform Go/No-go before responding
3. Responders use an average of 9 people in to complete a response
4. Responses take 23 hours on average to draft

(Source: Loopio.com – RFP Submission Benchmarks - <https://loopio.com/blog/rfp-statistics-win-rates/>)

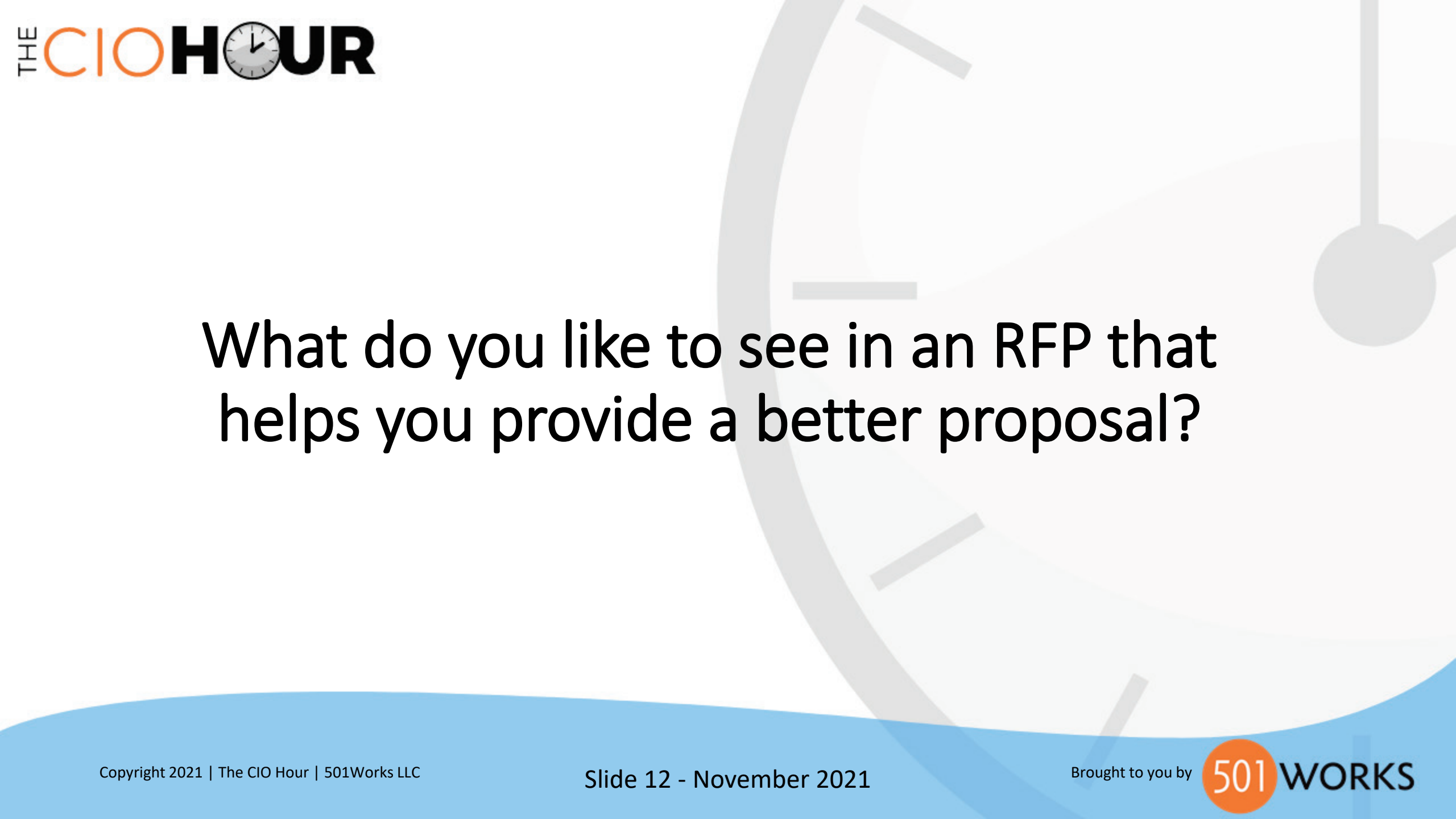


On to Your Questions...

RFI versus RFPs?

RFIs versus RFPs...

- RFIs should be short – quick hits
- Do your homework
- Spots for research: ASAE, Collaborate, ReviewMyAMS, AMSFest



What do you like to see in an RFP that helps you provide a better proposal?

Help us help you...

- Communicate – we know it is a formal process, but the more we know the better your responses.
- Keep requirements and vendor questions separate – it makes them easier to track and respond.

Help us help you...

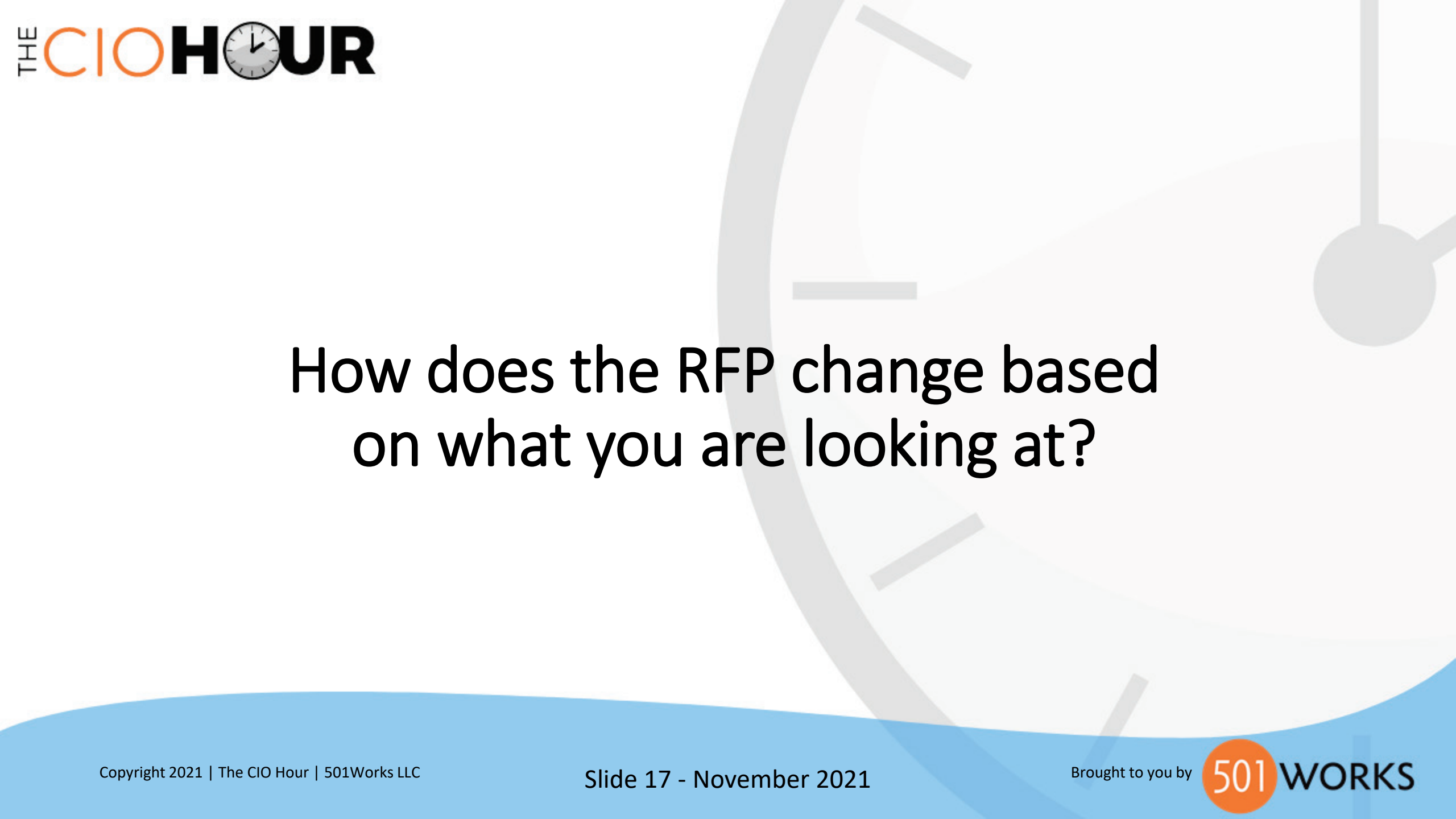
- Budget Transparency – no need for exact numbers, but ranges/examples should be given.
- Identify Must-haves versus Nice-to-haves.
- Describe what success looks like – have distinct project goals.



What things makes you sad to see in an RFP?

Don't leave us in tears!

- An RFP sent to the world - there is no way an association can properly review too many responses.
- Response fishing because of a mandate to have a certain number of bids.



How does the RFP change based on what you are looking at?

Good RFPs share things in common -

- Include your journeys
- Define your goals
- Detail problems you are looking to solve
- Detail your environment
- Are there deal breakers?



Tell us about a bad experience
with the RFP process.

The good, the bad and the ugly!

- Short timing and then the ghost – Limited time for a response followed by months of silence.
- “Apples to Apples” not “Apples to Turkey Dinner”
 - Evaluate systems consistently around your needs – avoid considering items that are not relevant to your decision.

What is one unique thing you
have seen in an RFP that
improved your responses?

Great experiences -

- Consultants are great – but we need interaction with staff – they own it once the system is implemented.
- Ask questions and negotiate – we are all people in the process. Budget concerns, a missed requirement, ask for clarification...

Other Questions?



Thank you to our team of experts!



If you have additional questions,
please contact Bryan Clark:

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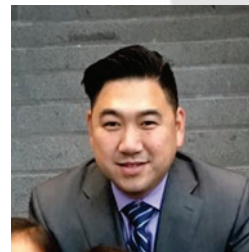
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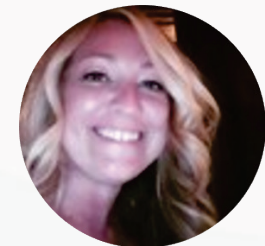
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AMS/CRM Software Selection Survey

Selecting and implementing a new AMS/CRM can be a painful, disruptive process for associations and their staff. Software projects also experience a high failure rate. There needs to be a better way to handle this critical task.

It's time to envision a different approach that will help all stakeholders meet their objectives in an easier, more productive way. Be part of the solution by sharing with us your experience as we craft tools and education to help the industry navigate these tricky waters.

TAKE OUR SURVEY



501Works

Founded by experienced executives envisioning a better way to make technology work for associations.

PRODUCTS & SERVICES



- **Mojo Middleware™** - 501Works's flagship product to easily integrate association software.
- **Software Mage™** – a tool that helps you navigate the AMS/CRM selection process, gather requirements, draft your RFP, and evaluate vendor responses.
- **Customized Software Solutions and Integrations**
- **IT Consulting Services**
- **Advanced Web Design and Content Solutions**



Want a One-on-One with the 501Works CIO?

30-minute free consulting session for today's participants. Call or email us:



703-459-9779



theCIOHour@501works.com



<https://theCIOHour.com>



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Final Thoughts

- Join us on December 2nd for ***IT Smack Down***.
- An archive of this presentation and today's Webinar will be posted on theCIOHour.com in a few days.
- Any suggestions for future programs? Topics you would like to see covered? Please email us: theCIOHour@501works.com
- For CAE credit – you will receive a link via email tomorrow so you can claim your credit and receive your certificate.

