

# Extracting Maximum Value from the RFP Process

## MODERATOR:

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## SPEAKERS:

### Tom Beyer

Director of Platform Services  
Sheridan PubFactory  
Boston, Massachusetts

### Dana Compton

Senior Consultant  
KWF Consulting  
Fairfax Station, Virginia

### Amy McPherson

Director of Publications and  
Managing Editor  
Botanical Society of America  
Saint Louis, Missouri

## REPORTER:

### Alison McGonagle-O'Connell

At the 2018 CSE Annual Meeting, 3 RFP "experts," each intimately familiar with different roles within the process, shared unique perspectives with one another, as well as with the audience of over 60 session attendees. The result was a lively discussion among presenters and a spirited Q&A following the presentation and discussion.

First, Amy McPherson, Director of Publications at the Botanical Society of America, shared her experiences issuing an RFP from the smaller society perspective. Small societies may issue RFPs for services including publishing or technology partnerships, peer review systems, or publishing platform services. These decisions may go through committees with members from many different backgrounds with differing ideas, and for this reason Amy highlighted the potential need for change management before beginning the process.

"Change is hard!" said McPherson. Without having all stakeholders on board, and in agreement with what the problem is, and why a particular solution is important, the RFP process with a multi-stakeholder committee may be very long and difficult. "Don't go it alone," said McPherson, who recommends engaging those with experience, including consultant organizations, to help keep the process moving forward.

Next, Dana Compton, Senior Consultant at KWF Consulting talked about the role of a consultant in the process. Her perspective extended to best practices for publishers of all shapes, whether issuing the RFP alone or with the help of a consultant. In her talk, Dana shared suggestions for eliciting impactful responses, whether from a commercial publisher, a technology service provider, or other vendor in workflow.

Dana highlighted the importance of being realistic when issuing an RFP. This included a suggestion to clearly identify the goals of the RFP early on in the process, and assess needs as

## Most important pieces of advice

- Change is exciting, necessary—and **hard**. Acknowledge and discuss what the changes will mean as often as needed.
- Be prepared to spend a lot of time and energy gathering information, answering questions, and having (sometimes) uncomfortable discussions.
- Keep the Big Picture in mind and know what really matters to your Society.
- Communicate and be as transparent as possible.
- Talk to others who have gone through a similar process.
- Don't do it alone.

Advice from Amy McPherson on issuing RFPs.

"must-haves," preferences, or "nice-to-haves." Dana also made suggestions for structuring the RFP process to yield results focused on solving a specific, stated problem, and formatted to facilitate an apples-to-apples comparison of responses.

Above all, Dana stressed the importance of openly sharing accurate, reliable information with RFP respondents. "The promises made in a proposal are only as good as the data in the RFP," she stated. Financial projections, proposed features, and service levels offered in proposals are all based on historical data and experiences.

Last, but certainly not least, Tom Beyer, Director of Platform Services at Sheridan PubFactory, presented from the perspective of a service provider that is responding to RFPs from publishers of all sizes, both with and without consultant involvement. Tom reported that most frequently, responses are to scholarly publishers directly, to the tune of 30–50 per year.

"The most important thing is to communicate!" said Beyer, stressing that if the 2 parties do work together, the relationship will be long term, and it is best to set both sides up for successful rapport right from the start with clear, frequent, open communication.

Throughout all the presentations, a common thread was transparency. The more transparent organizations can be with themselves about 1) what they really want to do in exploring any type of change, 2) what partners they realistically would most like to work with, 3) the resources they have available to make changes, and 4) what their timelines are, the more successful their RFP engagements

## CONTINUED

**Top tips**

- Clearly identify business problem/opportunity prompting RFP
- Assess needs: critical, preferred, and nice-to-have
- Gather—and vet—relevant historical data
- Establish realistic timeline and process
- Agree on basis of award of contract
- Structure RFP to facilitate apples-to-apples comparison of offers
- Excel template with clear assumptions for financial projections
- Reasonable expectations: predetermine essential, trade-off, ideal positions

**Communicate, communicate, COMMUNICATE!**

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RFP tips from Dana Compton.

can be. While some parts of the process historically require a black box approach, all presenters seemed to agree that more transparency and open communication guarantees all parties higher levels of success—whether that is finding the right partner, narrowing down respondents, or deciding as a vendor how much of one’s resources to put into a response.

### Links to Presentations

1. <https://www.councilscienceeditors.org/wp-content/uploads/7.2-McPherson.pdf>
2. <https://www.councilscienceeditors.org/wp-content/uploads/7.2-Compton.pdf>
3. <https://www.councilscienceeditors.org/wp-content/uploads/7.2-Beyer.pdf>