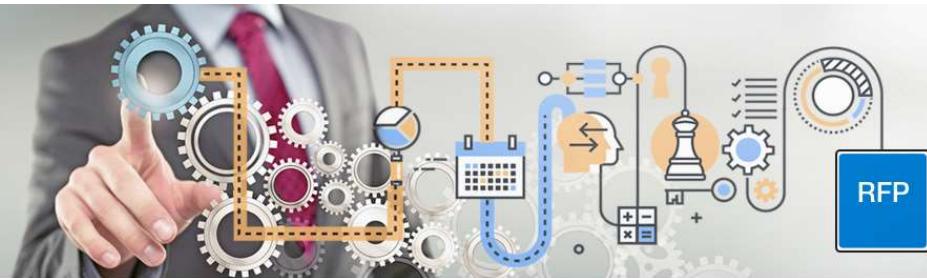


PAICR | THE ASSET
MANAGEMENT
MARKETING
ASSOCIATION

2018 RFP SYMPOSIUM

MAY 7 | CONVENE PARK AVENUE

SOME ASSEMBLY REQUIRED:
THE RFP PROCESS END-TO-END



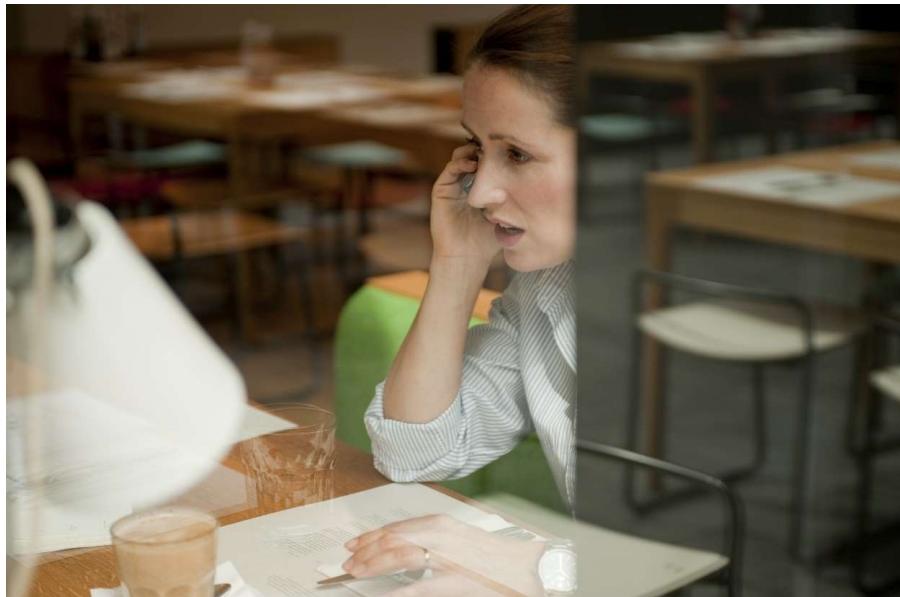
Quality vs Quantity



Melanie Murray Marketing Manager, Baillie Gifford

How do you ensure excellence when pressure is applied? This session will give RFP writers and managers strategies for maintaining high quality and morale when faced with the inevitable pressure of multiple deadlines and shorter turnaround times.

To stress or not to stress?



The Three 'Ps'

Tools to help

The Three 'Ps'

- Process
- Preparation
- Peer Review

Process

- Ensure you have a good process in place
- Make it Simple
- Follow it!
 - Ticklist?
 - Review – is it working?
 - Make sure your stakeholders know it

Preparation

- Help yourself – plan out your RFP
- Kick-off meeting essential - who should be involved?
- Timeline – diarise
- False deadlines – yes or no?
- Communication
- Read through – away from desk!

Peer Review

- Teamwork!
- Second pair of eyes
- Leave enough time - essential

You are (not) Superman/woman!

- Manage expectations
- Say no! (nicely)
- Explain process
- Escalate?



Celebrate!

