
CONDUCTING RFP POST MORTEMMS

Win rates on RFP competitions average between 30-50%. So you're likely to have more losses than wins. Making the most of a loss by conducting a post mortem interview can not only help you improve your next RFP response but it can position you for work with the prospect that turned down your proposal should the winner not prove to be a good fit.

Your firm should have a formal and consistent process for gathering feedback on RFP submissions, whether or not you win the competition. Information gleaned from wins and losses are equally valuable. And both send a powerful message that your firm is dedicated to continuous improvement and client satisfaction.

It is important to be clear about what you are trying to accomplish when conducting post RFP reviews with clients. The objective should be first to understand the company's selection criteria and second to identify ways to improve your proposals and the communication of your services. Do not go into the meeting with the idea that you are going to find a way to win other work or reverse their decision. Clients can smell ulterior motives like rotting flesh and it will turn them off just as much.

I suggest using third party professionals who can provide an unbiased assessment, bring in other comparative experience and draw out the most honest feedback from clients. If, however, the lawyer(s) conduct the post mortem interview, it is important that the interview is conducted as objectively as possible. Seek only to understand. Avoid defending the firm or trying to explain responses. There is much more value in learning the perceptions that clients have of the firm than to try to correct minor misperceptions of the firm's response- unless they are glaringly and corrosive.

Post mortems should be conducted in person where possible. Scheduling the post mortem should occur as quickly after the announced decision as possible and a brief set of questions should be sent to enable those interviewed to prepare for the meeting. The closer you can get to the actual decision makers the better the information will be. You should try to get at least one person in the company to speak to you who was involved in the entire process and knowledgeable of as many functions which participated in the process as possible.

Lastly, don't forget to follow up with the clients with thank you notes and a memo describing some of the important lessons gleaned from the post mortem and any next steps or follow up actions that were promised during the post interview. You will have impressed them with your focus on continuous improvement so stay in touch with your contact at the company. You never know when another firm will screw up and they'll be looking for a firm more focused on delivering high quality legal services.

The following are a series of questions that you can use in the interview. They are in no particular order.



SUGGESTED QUESTIONS

- Who won the work and why did they win it?
- What qualities or strengths stood out about the winning firm?
- What qualities or weaknesses did you not like about the winning firm?
- How many people and who were they that had influence over the final selection decision?
- What non-legal services factored into your decision? (non-accounting or non-legal)
- How did you select the firms which received the RFP?
- On which key factors did the decision hinge and how would you prioritize the importance of each of these key factors?
- What was the overall impression of our firm?
- What was your overall impression of our people at the presentation?
- What did you find were the strengths of our firm?
- What did you find were the weaknesses of our firm?
- What was your impression of the working relationship exhibited by our team in the presentation?
- Were we accessible for your questions and how well were your questions answered?
- How did our pricing/fees line up with the other firms?
- What other advice would you give us to help us improve our responses?
- Is there anything we should ask that we didn't ask?
- How would you rate the quality of our written materials?
- How would rate the quality of our technology offering?
- How would rate the quality of our understanding of your business?



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- To what extent did diversity, pro bono, community investment and other initiatives weigh on your decision?
- Would you consider us for other service needs that you have or if your main firm is conflicted out?

