

STANDARD OPERATING PROCEDURES

RFP Creation

STAGE 1

Communicate need for RFP assistance & deadlines to Marketing

1. When is the official due date? Invite Marketing@fisherstech.com to a calendar invite for the day the RFP is due to the client.
2. When do you plan to have all content to marketing? Invite Marketing@fisherstech.com to a calendar invite for the day you will have all written content delivered to marketing.
 - a. Keep in mind: Marketing needs 3 business days to produce a “First Draft” after all written content has been supplied to them. If you are expecting to edit the written content after the draft – please account for extra editing time, per your deadline.

STAGE 2

Gather basic layout needs and supply to Marketing

1. Title of RFP Example: **Co. Name** Managed Print Services Request for Proposal
2. Table of Contents (TOC) – this helps us build the base of the RFP section structure, while we are waiting for the actual content. Best practice: your TOC should follow the order of the questions provided in the RFP.
3. Identify who at Fisher’s will be listed under the Intro Letter? Usually Leadership, Market leadership, Service Manager, etc. See example on following pages.
4. Please let Marketing know if you have any specific new graphics that you hope to be created.

STAGE 3

Supply Marketing with finalized copy (word format), and any supporting docs (save as a JPEG or PDF)

1. Finalized copy to be in a separate word document per Table of Contents (TOC) category. Example: A word doc entitled, “Objective” will be placed under the “Objective” Tab(s).
2. Rename the supporting docs with the TOC category and identify whether it should be placed at the beginning, or end of a section.
3. Marketing uses generic Fisher’s graphics and photos. If you want specific photos included in your response it is your responsibility to gather them and identify where in the text you would like them placed. I.e. in the “Objective” word doc, you would label the image Objective A and place the word Objective A in the text where you want the supporting image.

----- FIRST DRAFT IS PRODUCED 3 DAYS LATER -----

STAGE 4

Last minute changes happen in this stage. All content revisions need to be consolidated and provided to marketing as a single revision request.

----- FINAL DRAFT IS PRODUCED -----

Account Manager and/or Sales Support is to coordinate printing, ordering of binders, assembly and/or delivery for RFP's.

Tips

Please have 1 person being the “gatherer” and “communicator” of the changes – No one likes being on a huge email thread – also, this is how valuable information gets lost.

Please provide feedback that is typed out – Handwritten is often times not legible.