Demystify the Process of...

Responding To a RFP

Get AHEAD of the Crowd and GET the Job in 3 Easy Steps

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DISCLAIMER

All information contained in this e-book is solely for educational purposes. This is a basic informational guide to assist you in writing a professional response to a work request and Be Virtual Assistant Wise does not offer any guarantees of your income or success when applying or using information and resources provided in this e-book. As with any business it takes research, planning, motivation, dedication and hard work to reap any rewards.

While all attempts have been made to verify provided information Be Virtual Assistant Wise disclaim any responsibility for errors, omissions or contradictory interpretation of the subject matter herein.

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INTRODUCTION

Responding to a RFP can be a daunting task for many people...

...but it does not need to be difficult.

Compiling a professional response does require some effort, but breaking the RFP process down into a few essential steps and looking at it from a right brain perspective will certainly simplify the whole process and help you land the jobs you deserve.

Our purpose with this e-book is to assist you in preparing and submitting a proposal with confidence. The process we will follow involves the following 3 steps:

1) Understanding the request
2) Compiling and refining the proposal
3) Following up

... and each step is important to ensure a successful proposal process.

But let's quickly look at each step before we delve into the detail.

STEP 1: Understanding the Request

You only have one chance to grab your potential client's attention and it can only be done when you address all his/her needs in your proposal. It is therefore very important that you (1) understand the request and (2) are able to match your skills and experience to the required needs.

We will take you through the RFP process on the hand of an example and a "*dummy*" Request for Proposal. (Once you understand the example, you can apply the same process for your own proposals).

We will then use the very effective "***5WHOW*** process" (Who, What, Why, When, Where and How) to determine the specific needs of the client (in the "*dummy*" RFP). The "***5WHOW*** process" will show you how to break a request into smaller pieces to highlight the important issues that need to be addressed.

(The attached document called *5WHOWWorksheet_Example* contains the info of the "***5WHOW*** process" obtained from the Dummy RFP.)

STEP 2: Compiling and Refining the Proposal

To make a good first impression, it is necessary that your proposal is compiled in a professional and organised manner. A professional proposal portrays the right image and can help set you apart from the crowd.

We will use the data and information from the "***5WHOW*** process" (in Step 1) and in the attached document *5WHOWWorksheet_Example* to take you through the actions of writing a proposal in Step 2.

Step 3: Following up

Submitting your proposal is not the end of the proposal process. To be able to close the deal, it is necessary to follow-up on the proposal about 2-3 days later to show the potential client that you are enthusiastic and prepared to work with him/her.

So, Let's Get Started

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STEP 1: UNDERSTANDING THE REQUEST

THE "DUMMY" REQUEST FOR PROPOSAL (RFP)

A RFP can be anything from a short description of services needed to a very detailed outline of what people want.

Below are **3 examples** of typical RPFs that can be received.

RFP Example 1: (*short*)

Name: *Jackie Jones*
Company: *TJJC*
Contact details: *Tel: 123 456 1234*
Email: abc@gmail.com

Description of Position/Project: *I host an internet radio show and I need a VA to assist me with building my business up. I would like to start with a blog, e-zine, marketing piece to update clients and build a subscriber base.*

Software, Hardware, Special Skills Required: *Internet, Social Media Marketing*
Closing Date to Respond to RFP: *6/10/09*

RFP Example 2: (*short)*

Name: *John Bloomfield*
Contact details: *Tel: 789 123 2345*
Email: xyz@gmail.com

Description of Position/Project: *I am looking to find a VA for the first time and am not completely sure how often I will need assistance.*

I will be mainly looking for general administrative assistance. In the beginning I would like to field out a simple but regular task, transcribing a form that I complete on paper to the word version. I do, however, hope to build a relationship of trust with the VA that can allow me to field out much more complex jobs as time goes on.

Software, Hardware, Special Skills Required: *Familiarity with MS Office, excellent English and an understanding of the difference between UK and US English.*

Closing Date to Respond to RFP: *23/10/09*

Not all RFPs will be straightforward and easy to respond to. The above 2 examples fall within this category as they do not give you much information. It is often difficult to respond to such requests as it contains a lot of uncertainty about what the client actually needs.

Tip: When you receive a short or unclear RFP and you are not a 100% sure of what the person's requirements are and how you should respond, you can always contact them via either email or phone.

Inform the potential client who you are, where you received the RFP, that you are interested in submitting a proposal, but that you need more information. Then ask the person any questions that may help you to understand the project and the client's needs. This will put you in a better position to submit a professional proposal that can tip the scale in your favour.

RFP Example 3: (*detailed*)

NOTE: We will use the following detailed RFP to demonstrate the process of Responding. We will apply the "5WHOW process" on the detail as requested in the "dummy RFP" below and also write the "Dummy Proposal" in Step 2 as a response on the Request from John O'Connor.

Name: *John O'Connor*
Company: *XYZ Financial Services*
Contact details: *Tel: 789 123 5432*
Email: FinancialPlanner@gmail.com

Description of Position/Project: *Job Description for Assistant*
(These instructions are detailed and clear. If you do not follow them precisely, we'll know that you are not to be seriously considered for this position.)

Financial Planner Seeks a detail oriented Virtual Assistant Professional who*:*

- *Manages Sales Director's calendar, coordinating appointments with clients & prospects*
- *Make sure Sales Director has required documents and case follow-up files for updates & progress from last meetings*
- *Identifies and delivers client forms necessary for Sales Director and client according to Client Cycle Timeline*
- *Manage incoming email into urgent, important, and other; responding when possible and integrating onto the calendar where necessary*
- *Sync existing database to Outlook and Mobil Me for iPhone*
- *Contact examiners to order medical exams for clients re: insurance applications*

- *Organizes & coordinates the completion of insurance applications & documents in support of client being underwritten for life, disability, health insurance*
- *Manage ongoing personal client contact (birthday cards, point of interest letters, other warm & fuzzy touch point communication)*
- *A creative and technologically savvy individual who enjoys:*
- *Marketing - online and email & response follow-ups to prospects*
- *Managing PodCast production schedule (production/editing time, scheduling guest appearances, troubleshooting any technical difficulties), post online, marketing support message dissemination*

In addition, our clients are very high end, so, individuals who do not possess the following qualities, need not apply:

- *Someone who is friendly and enjoys talking to clients and prospects on the phone*
- *Someone who is all about a mutually desired result for everyone involved*
- *Someone who has a high level of accountability and integrity*
- *Someone who tends toward being early and on some occasions stays longer to get a job completed*
- *Someone who has friends that describe them as "a giver"*
- *Someone who enjoys time off and taking vacations*

If this is you, please submit an estimate or proposal for part-time, executive administrative support.

Description Software, Hardware, Special Skills Required: *Google Docs, Word, Outlook, MobilMe*

Closing Date to Respond to RFP: *01/02/2010*

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THE "5WHOW" CONCEPT - PREPARE AND UNDERSTAND THE REQUEST

Before you even start to respond to a RFP make sure you understand exactly what is requested.

The best way to find out more about something is to ask questions, not so?

Thus, the starting point with any RFP is to ask questions like *Who, What, Why, When, Where* and *How* and to write down the answers.

These questions form the basis of the "**5WHOW Concept"**
(*The* **"W***ho,* **W***hat,* **W***hy,* **W***hen,* **W***here and* **H***ow" concept)***.**

The "***WHOW*** words" are the anchor words to carefully selected questions that break a request into manageable pieces and highlight the more important points that should be addressed in the final proposal.

(NOTE: Please refer to document "5WHOWWorksheet_Example". The document is populated with the details of the 5WHOW process as applied to the RFP from John O'Conner in "dummy RFP" Example 3.)

It is important to ask the "***WHOW***" questions from two different angles - the client's perspective, as well as your own perspective. To get a better perspective of who the client is and what his/her business is all about, it is always a good idea to do some research before answering the questions and writing the proposal.

The questions to ask are;

1. **W**ho wants the service; **W**ho am I?
2. **W**hat do they expect me to do, **W**hat equipment do I need, **W**hat special skills do they want; **W**hat can I do to assist them, **W**hat equipment do I have, **W**hat special skills do I have?
3. **W**hy do they need these services; **W**hy am I the best candidate?
4. **W**hen do they expect me to do it / to complete it; **W**hen can I start?

5. **W**here is the client situated; **W**here am I situated?

6. **How** much is it going to cost them; **How** will I charge, **How** much time and effort are involved?

Answer these questions and identify the tasks and services needed as well as the solutions that you can provide. Then identify any added benefits to enhance your proposal and give the client a little bit extra.

The information that is gathered via the "**WHOW"** process is used in a structured manner to compile the proposal. For example

1. **W**ho wants the service; **W**ho am I ***(Introduction)***

2. **W**hat do they expect me to do, **W**hat equipment do I need, **W**hat special skills do they want; **W**hat can I do to assist them, **W**hat equipment do I have, **W**hat special skills do I have? ***(Skills / Address their needs)***

3. **W**hy do they NEED my services; **W**hy am I the best candidate ***(Experience / Benefits of my services)***

4. **W**hen do they expect me to do it; **W**hen can I start ***(Benefit - Attention)***

5. **W**here is the client situated; **W**here am I situated? ***(Benefit – Attention)***

6. **How** much is it going to cost them; **How** will I charge, **How** much time and effort are involved? ***(Costs and Professional Fees)***

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STEP 2: COMPILING AND WRITING THE PROPOSAL

Only once you've answered the questions via the ***WHOW*** process and did your research on the company or person who has submitted the RFP, you are in a position to start writing the proposal.

TIP: A proposal should be written with clarity and brevity.

HOW TO WRITE A PROPOSAL

Below is a short outline of important sections that need to be addressed in your proposal.

Front Page

A professional proposal contains a front page with

- Your company logo
- A title
- The date of the proposal
- To whom the proposal is addressed (the client's name / company)
- Your name and all your contact details

Table of contents

If the proposal is quite lengthy, it is always a good idea to include a "Table of Contents". It gives structure to the proposal and assists the client to find the information (s)he needs quickly.

Executive Summary

An executive summary is not always needed, but it portrays a professional image. If the proposal is quite long, an executive summary can state where and how you received the RFP (if it came through an organisation you belong to, you can mention it here) and to give a quick overview of the important aspects contained in the proposal.

Introduction (*Who*)

Break the introduction into two parts. Make the first paragraph all about your prospective client. Give details of what you know about them and their business. (*This information can be gathered from the proposal, via their website, or via any newsworthy articles or press releases that you could find about the prospective client*). Ensure that they know you understand their special needs (summarize it here) and how much they need your assistance.

The second paragraph can be about you. Tell them who you are. The golden rule is never to lie about your skills and abilities but also do not undersell yourself.

Proposed Services (What and Why)

This is where you tell your prospective client about your skills, abilities and experience and how the client can benefit by making use of your services. Be specific and to the point without losing the message.

Address all the "***what do they expect me to do's***". Elaborate on your skills and experience. If applicable mention training and experience that relates to the business they are involved in.

If they need special equipment and or services, make sure you address it here.

Benefits (Why, When, Where)

Outline why you think you are the perfect Virtual Assistant to assist them. Also mention when you will be able to start. Include extra information that can enhance your proposal and show the client you are willing to go beyond the call of duty. If different time zones can be of benefit, mention it here.

Cost and Professional Fees (How)

Include your fees. To determine the costs involved and what your professional fee should be, is sometimes the difficult part. Some clients want to know what your rate per hour is and others prefer to know how long it will take to complete the task. Either way, you have to do your homework properly. The secret however is not to be vague.

Take some time to figure out how long the tasks listed in the RFP will take to complete and put in a definite price. For example: *"It will take me 12 hours to complete the tasks properly. At my current rate of R200-00/hour this will cost you only R2400-00"*.

If you have a retainer rate, mention it or attach the schedule. If your terms and conditions specify a deposit and exclusions you should also mention it. Include any additional charges that may be incurred (e.g. courier costs, long distance phone calls, taxes etc).

If you cannot clearly determine from a RFP what the client specifically wants and how long it will take you, it is sometimes better to play safe with one of the following.

- Ask the client when you can contact him to discuss the details of the request – this will give you a better idea of what he needs and how to structure your costs (per page / per hour / per project), or
- Tel the client that you will follow-up the first email with a more detailed proposal that will include your normal pricing structure or
- Quote your normal rates but inform the client that you will be able to give him a proper, detailed quotation once you've received more information on the request and his specific needs.

Summary / Closing

Thank the client for the opportunity to submit your proposal. Remember, you want the job, so tell them that you know you are the perfect Virtual Assistant to accommodate their needs. Mention that they are welcome to contact you personally for a free consultation should they have any questions.

Signature Section

Include an approval signature section at the end of your proposal. This will allow the client to accept the proposal and will start the process to formalise the working relationship

Addendum

Some extras that you may need to include:

- Client references
- Resume or CV
- Proof of certifications or licenses relevant to the clients industry or project

EXAMPLE PROPOSAL

NOTE: The following example proposal is based on the "dummy" RFP from John O'Connor (RFP Example 3 above) and use the information from the WHOW process in the attached document "*5WHOWWorksheet_Example*".

PROPOSAL FOR VIRTUAL ASSISTANCE TO THE FINANCIAL PLANNER / SALES DIRECTOR XYZ FINANCIAL SERVICES

Prepared **for**

John O'Connor

XYZ FINANCIAL SERVICES

Prepared **by**

Marietjie Steyn

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Submitted on
18 January 2010

Table of Contents

Statement of Confidentiality and non-Disclosure

This proposal contains business and confidential information. All data submitted to XYZ Financial Services is provided in confidence upon its consent not to use or disclose any information contained herein except in the context of its business dealings with Express Virtual Assistant Services.

The recipient also agrees not to duplicate or distribute or permit others to duplicate or distribute any material contained herein without Express Virtual Assistant Services' written consent.

Express Virtual Assistant Services retains all title, ownership and intellectual property rights to the material and trademarks contained herein, including all supporting documentation, files, marketing material and multimedia.

BY ACCEPTANCE OF THIS DOCUMENT, THE RECIPIENT AGREES TO BE BOUND BY THE AFOREMENTIONED STATEMENT.

Executive Summary

This proposal is in response to a Request for Proposal for a ***Virtual Assistant Professional*** received on 16 January 2010 via the organisation, Be-Virtual-Assistant-Wise.

Express Virtual Assistant Services (E-VAS) is pleased to present XYZ Financial Services with this proposal.

Express Virtual Assistant Services understands that XYZ Financial Services has the need for 'part-time, executive administrative support' and recognises the unique opportunity of outsourcing these important tasks to a professional virtual assistant. Outsourcing day to day administrative activities will help XYZ Financial Services to optimize time concentrating on the core activities of their business.

Having duly examined your requirements, I am confident that my proposed services will effectively address your needs. My goal is to take care of all the administrative duties as per your request and to communicate and keep you updated on a daily basis by means of Skype, e-mails and/or any other communication method you may prefer. By availing my services, I will ensure that XYZ Financial Services

- will have effective calendar management with updated appointment co-ordination, client contact information and synchronisation of information to mobile phone;
- receives updated documents and files for client appointments and that medical examinations will be arranged and followed up with examiners in order to complete insurance applications;
- will be well informed about important incoming e-mails and that e-mails are integrated onto a calendar as necessary;
- has a schedule of their Client Cycle Timeline and will make sure client files are delivered on time;
- has online presence and will run an e-mail marketing campaign in order to get more clients.

When Express Virtual Assistant Services takes care of your administrative duties, you will have the opportunity to focus solely on core activities to grow your business with the peace of mind that the back end of your business is handled by professional administrative support.

My unique abilities furthermore include database management and good communication and telephone skills. I take accountability for, and pride in the work I do. I consider myself as being trustworthy and my successful track record in Virtual Assistance especially in the Insurance and Marketing Industry makes me an enviable prospect. I am looking forward to forming a mutually rewarding independent contractor relationship with XYZ Financial Services.

Introduction

Identification of Needs

Express Virtual Assistant Services understands that XYZ Financial Services is a client orientated business and as such client support is an important aspect of retaining old clients and acquiring new ones.

Furthermore E-VAS understands the importance of appointments to portray a professional client orientated image, and as such, the knowledge that all the administrative tasks such as calendar and email management, appointment scheduling, document management with regards to insurance applications and progress reports as well as personal client contact management are handled by a trustworthy, competent Virtual Assistant Professional, will enhance XYZ Financial Services' business operations and give them time to focus on core client related matters.

The requested work will involve an ongoing relationship and 'partnership' between XYZ Financial Services and Express Virtual Assistant Services and offers a cost effective solution to XYZ Financial Services in the sense that you need not employ a full-time Personal Assistant and submit office space, equipment and benefits.

Express Virtual Assistant Services is well equipped and in a position to handle the request virtually to ensure customer satisfaction.

Express VA Services: Company Background

Founded in 2006 by Marietjie Steyn, Express Virtual Assistant Services (http://www.mywebsite.co.za) offers advanced administration services to small and medium sized businesses. I have 15+ years previous experience in the Insurance and Banking industry as well as the Real Estate industry and have been very successful in database management, marketing assistance and customer contact management services.

Contact management experience include services such as managing emails, calendars and appointments as well as personal client contact via phone calls, follow-ups and personal notes to maintain touch point contact between my clients and their clients.

Express Virtual Assistant Services currently serves a number of regular customers and are performing database- and client contact management for 1 other client and ongoing on-line marketing for another client. (Please refer to attached testimonials).

CERTIFICATIONS, ACCREDITATIONS and MEMBERSHIPS

- Master Virtual Assistant Certification - VACertification 2008
- Advanced Certificate for Personal Assistant – GigaSkills Traning 2005
- Premium Member - Be Virtual Assistant Wise
- Member of VA Networking

AWARDS

- Personal Assistant of the Year 2004, 2005 and runner up in 2006 – DreamTeam Homeloans

MISSION STATEMENT

Express Virtual Assistant Services deliver e**X**cellent administrative services when '**P**artnering' with entrepreneurs and small and medium enterprises. We strive to deliver **R**eliable, **E**ssential administrative services to our clients to help them **S**ave on time and monthly expenses by out-**S**ourcing non-core activities.

Proposed Services

Objectives

I believe the following main objectives must be achieved:

- Effective calendar management and e-mail integration;
- Effective management of client records, scheduling of appointments and following up of records;
- Effective database management and upgrading of current client relationship;
- Implementation of web-presence in order to run marketing campaign

Services

Express Virtual Assistant Services will:

- do daily updates of appointments and ensure all appointments are communicated in time to XYZ Financial Services in order for the Sales Director to have enough time to update himself or do the necessary preparation before meeting with the client;
- compile and prepare documents from former meetings and case follow-up files to ensure the Sales Director is updated with all progress;
- update files and documents for client appointments and deliver them via email to the Sales Director before eight in the morning;
- prioritise incoming e-mails, respond when possible, integrate emails and appointments into the calendar and inform the Sales Director about those e-mails that need to be attended to by himself;
- develop and update the database and synchronise them between Outlook and MobilMe in order for the Sales Director to keep in touch with current and new clients. Birthdays, anniversaries and important dates and events will be diarized and addressed and wishes will be send to clients. More important events and dates (as

determined by the Sales Director) will be communicated to him in time in order for him to make contact with the specific client;
- arrange medical examinations for clients and inform clients of their appointments with the medical examiners;
- follow up with clients and medical examiners in order to get the examinations back;
- make sure all documentation is complete in order to finalize insurance applications;
- research the viability of an effective on-line and e-mail campaign and do a proposal in order to ensure maximum exposure and response;
- Additional services can include:
  - establish a web presence via social media channels like Facebook, Twitter and LinkedIn (to mention but a few) and do daily updates (these updates will be discussed with the Sales Director prior to placing) in order to build business relationships and to use social media as a marketing medium;
  - list XYZ Financial services on various on-line business directories to create wider on-line exposure.

Apart from the above services as specified in the RFP, Express Virtual Assistant Services can also perform the following services on an ad-hoc basis should XYZ Financial Services need it. These services include

- Desktop publishing to develop additional marketing material i.e business cards, flyers, and powerpoint presentations to assist XYZ Financial Services with their marketing activities.
- Account Management
- Event planning / concierge services

Benefits of Our Proposal Plan

Why Choose Express Virtual Assistant Services

Apart from the noticeable benefits of
- Cost savings on fringe benefits like pension fund contributions, unemployment fund contributions, no employee tax registration, tax deductions and payments to SARS;
- Lower running cost and expenses, no office rent (Express Virtual Assistant Services works from their own offices and communicate with their clients via internet technology) and no need to provide office equipment;
- Peace of mind and time to concentrate on core activities that derive income instead of handling own administrative activities;

additional benefits for XYZ Financial Services when choosing Express Virtual Assistant Services include:
- Excellent ROI (return on investment) due to experience of more than 10 years in the Financial and Insurance Sector;

- No costly training and lengthy information sessions due to past experience and the ability to quickly adapt to the insurance environment;
- A well organised system due to partnering with a stable and well established Virtual Assistant Business with excellent track record, organisation abilities, integrity and reliability;
- Outstanding client relations and a friendly business image due to personal contact and interactions with clients, a well established client contact management system, and friendly yet professional customer services.

Customer Service Benefits

Express Virtual Assistant Services is a customer orientated business. We deliver exceptional services to ***our*** customers to ensure that ***their*** customers are happy clients. We aim to grow every business 'partnership' into a profitable business for our customers. We believe if our customers grow and are successful, it will be mutually beneficial.

Although it is impossible to be available 24/7, we will never let you down. If we are not able to complete a project during normal office hours we will go the extra mile to complete the task on time and will occasionally be available after hours to assist you when you have an important due date to meet.

Express Virtual Assistant Services will well in advance inform you and co-ordinate with you their vacation arrangements and will have a sub-contractor available to attend to your needs if you so prefer.

Success Stories

Express Virtual Assistant Services has worked on similar projects in the past and has successfully assisted several small businesses in the real estate sector, bond origination sector and insurance sector to grow their clientele with more than 100%.

The most notable relevant experience includes creating, maintaining and managing databases for DreamTeam Homeloans and Wizard Financial Services. Both companies are more than satisfied with the contact management, calendar management and social media exposure that we handle on their behalf (please refer to testimonials in the addendum).

Costs

Hourly Cost

Based on my analysis of your needs and the nature of my proposed services, the total costs involved are estimated at R3 125-00 per week.

The cost breakdown is as follows

Estimated hours: 12.5 hours per week (i.e. 2½ hours per day)
Estimated duration: 5 Days per week
Hourly rate: R250/hour

Working on a Retainer Basis

Should XYZ Financial Services prefer to work on a retainer basis, the following conditions are applicable:

Minimum of 10hours per week (8% discount): R230 / h
Minimum of 15hours per week (14% discount): R215 / h

Retainer Terms and Conditions

Should XYZ Financial Services prefer to work on a retainer basis, they can commit to any of the above retainer packages to qualify for the relevant discounted rate. Retainer rates are due **before** any work commences and are billed upfront on a monthly basis.

Unused hours will not carry over to the next week. Additional hours outside the normal retainer contract will be billed at the normal rate of R250 / hour

The minimum time period for making use of a retainer package is 6 months.

Cost savings to XYZ Financial services when working on retainer basis vs the same hours at normal rate are the following:

- 10hr / week retainer = ± R800 / month
- 15hr / week retainer = ±R2 100 / month

Payment Terms

All services and general costs (ie postage, copying and long distance phone calls) will be billed. This proposal provides an estimate of total costs. All amounts exceeding this quotation are subject to approval of XYZ Financial Services.

Payments shall be made before 12h00 on the last day of the month. Express Virtual Assistant Services will prepare and send an invoice to XYZ Financial Services on the 25th day of each month. This invoice will specify the exact amount of hours worked plus the extra costs agreed upon as per the first paragraph of Payment Terms.

Alternatively the invoice will state the number of hours as per the agreed upon retainer package.

All late payments are subject to a 15% monthly charge or the maximum permitted by law.

Payment must be remitted by electronic bank transfer and must be made payable to

Express Virtual Assistant Services
ABSA Vereeniging
Cheque Account Number: 123 456 7890
Branch Code: 123 456

Proof of payment should be faxed to: 086 623 6234 before 12h00 on the last day of the month.

Conclusion

It is proposed that XYZ Financial services evaluate the option to enter into a longer term relationship and to make use of the retainer package of a minimum of 15 hrs / week. This will ensure continuity in services and optimal administrative and contact management support and it is also the most cost effective option.

Express Virtual Assistant Services is confident that the proposed retainer strategy will enable XYZ Financial Services to have a client focused company. My organised, professional, yet friendly approach towards customer service will enable the Sales Director to solely focus his attention on revenue generating activities to grow his business.

Alternatively, XYZ Financial Services can contract with Express Virtual Assistant services on an hourly basis at R250/hour

I sincerely hope that XYS Financial Services will consider Express Virtual Assistant Services as a long term 'partner' and allow us to enter into a mutually beneficial Virtual Assistant relationship.

I am available for a free, no obligation consultation to answer any questions you may have and look forward to discussing this opportunity further.

After reviewing this document, the following steps can be performed in order to come to a final agreement:

- Submission of questions/suggestions
- Acceptance of this proposal by XYZ Financial Services
- Negotiation of terms, clauses, contracts and conditions

We declare this offer to be binding and free of errors or omissions. Due diligence has been performed in order to ensure compliance with your requirements and particular situation.

We agree to hold our proposal open for acceptance until 07/02/2010.

Thank you for your interest.
Sincerely

Marietjie Steyn
Owner
Express Virtual Assistant Services

Acceptance of Proposal

Please indicate acceptance of this proposal and your authorisation to begin work by signing below. Please note that this proposal expires on 07/02/2010.

____

Full Name & Signature

____

Date

Thank you for your interest in Express Virtual Assistant Services and we look forward to working with you.

Addendum

Include any extra documentation that is relevant to this request. E.g

- Client references
- Resume or CV
- Proof of certifications or licenses relevant to the clients industry or project

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NOTE: For your convenience a separate document called "RFP RESPONSE TEMPLATE" was prepared that can be used as a "fill-in-the-blanks" template when you are responding to a RFP.

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STEP 3: SUBMITTING & FOLLOWING UP

SUBMITTING THE PROPOSAL – THE FIRST IMPRESSION

Responding to a proposal is nowadays mostly done via email. It is thus also important that the first email you write to the client portrays your professionalism. If you received the RFP via an organisation you belong to, you can start the email similar to the following example:

> *"My name is Marietjie Steyn and as a member of Be-Virtual-Assistant-Wise, I was forwarded your Request for a Proposal in which you stated that you need a Virtual Assistant Professional to assist you with administrative and contact management tasks. I am the owner of Express Virtual Assistant Services and we specialise in helping small businesses with their administrative overflow. I'd be happy to help you."*

Refer to the original RFP and mention what they need.

Tip: It is good practice to include a copy of the original RFP at the end of your email message. The reason is that the client might have requested different proposals and by including the original one in your message, you leave no room for uncertainty and/or miscommunication.

NOTE: We are still using the "dummy" RFP of John O'Connor.

For example:

> *"In your RFP (see original below), you mentioned that you need assistance with*
> - *Effective calendar management and e-mail integration;*
> - *Effective management of client records, scheduling of appointments and following up of records;*
> - *Effective database management and upgrading of current client relationship;*
> - *Implementation of web-presence in order to run a marketing campaign.*

Briefly outline your experience in relation to the task(s) or project(s) that the client needs help with. For example:

> *"I have more than 10 years experience in the Financial and Insurance Sector. This experience equipped me to understand the daily pressures of your industry. As a Virtual Assistant Professional I furthermore have excellent experience regarding all the administrative tasks and contact management services you need and therefore consider myself as a viable candidate to partner with you. Please refer to the attached proposal for a detailed outline of my experience and expertise and how I will be able to assist you."*

Offer a link to your website / services portfolio / samples of your best work / testimonials in the email. Prospective clients want to learn more about you as well and will do their homework before partnering with you. Make it as easy as possible for them to get to know you better. For Example:

> *"You are welcome to review my services portfolio and samples of previous work done on my website at http://www.mywebsite.co.za"*

Lastly, thank the client for the opportunity to quote on their needs. For example:

> *"Thank you for the opportunity to quote and respond to your request. If you need any further information, I offer a no-obligation, free consultation hour where we can discuss your request in more detail and where I can answer all the questions you have.*
>
> *I'm looking forward to hearing from you.*
>
> *Kind Regards"*

Include all your contact details:

- Email
- Phone
- Fax
- Instant messenger details
- Website

NB: Remember to attach your Proposal to the email.

FOLLOWING UP

Sending the proposal to the potential client is not the end of the proposal process. It is also important to follow-up on the proposal in 2-3 days to show your potential client your enthusiasm and professionalism.

Following up can be either via

- A short email message
- Telephonic

Mention who you are and why you are contacting them. For example:

> *"I'm Marietjie Steyn of Express Virtual Assistant Services. I've send a proposal on 18th January 2010 regarding your request for a Virtual Assistant Professional to assist with various administrative and contact management tasks.*
>
> *I just want to enquire whether you've received the proposal and if I can assist you with questions you may have."*

Take the discussion (if it is telephonic) from there and answer his questions. If he received the proposal, but didn't read it yet, remind him about your free consultation to clear up any question he might have.

REASONS A CLIENT MAY NOT CONTACT YOU

There are multiple reasons why a client does not come back or do not contact you. Below are a few examples

- They have not read your proposal yet. By following up, you will make them curious to read it.

- They received an overwhelming response and are still working through all the documents. By following up, you will trigger their curiosity and it will set your response apart from the sea of documents they received.

- They are too busy to respond to those who were not successful or were unable to get back to everyone. By following up, they will re-read your proposal a second time which will impact positively on your chances.

- They didn't think it was necessary to get back to unsuccessful candidates. By following up, you know the outcome and can move on.

  Tip: If you are not successful, use the opportunity to ask the client if (s)he would be willing to share why you were unsuccessful in relation to the successful candidate. Explain to the client that you can use the information to improve on your proposals in the future.

FINAL THOUGHTS

- Responding to a Request for Proposal is often the only chance you will get to create a positive first impression.

- Be creative, professional and thorough and be yourself. That is generally the best way to produce a winning proposal and a lasting business relationship with the new client.

......And a Few General Tips*

- **Follow the RFP instructions** – It may seem obvious, but it is often overlooked. Read the RFP thoroughly and use the "5WOW process" to gather the information the potential client is asking for.
  - If they want samples of your work, provide a link to a portfolio or a link to your work as featured on someone's site or your own site.
  - If they want references, provide as many contact details as possible to people who can give a reference. Make sure you include the required number of references they need.

- **Do some homework.** The best way to offer a clear, professional reply that grabs attentions is to become educated about this client's business.
  - Most potential clients will offer a website address. Review the site and familiarize yourself with their business.
  - If the RFP does not provide a website address, the email address (especially the part after the @ might give a clue of their online presence).

  - Google the potential client's name and/or business name; read any articles he/she may have written
  - Check social media sites such as Facebook, Twitter and LinkedIn to see if you can find something to familiarize yourself with the client and his business.

- **Personalise the proposal** with something about their business / industry and what you have done for similar businesses to help them with their work.

- **Don't make it all about you.** Refrain from merely telling your prospect about "Who you are" or "What you have done in the past" without really addressing their specific requirements.

  a. Ensure you **understand WHAT your prospect needs** (*use the 5WHOW Worksheet*)**,** then tell them **HOW** you can meet those needs. If your proposal doesn't answer their need, the client might think you..
     - don't pay attention to what you're reading, or
     - you are not competent enough or
     - you just don't care – and each one of them will reflect negatively on your proposal.

- **Include all your contact information** in an easy-to-read format.

- If you offer a particular service that can be verified, **provide testimonials, references and samples** in your original bid so the potential client can confirm them.

- Ensure testimonial on your site or in your proposal contains at least the person's name and business name to **validate the testimonials as authentic**.

- **Look for keywords in the RFP.** If an RFP uses words like 'friendly' or 'mutual desired result' or 'customer orientation', include these words in the "5WHOW worksheet" and in your reply.

- If a potential client is looking for someone with specific experience, be professional about it. **Be honest and true to yourself and your client.**

- **Customise each response**. Use the supplied template but customise each response to fit the RFP itself.

- **Proofread, Edit and Reread.** Have someone else proofread your response for you. You don't want to distract your reader with spelling and grammatical errors. Remember, you are the example you set in your response - if it is carelessly done and sloppy, the potential client will believe your work will be sloppy as well.

- When sending proposals electronically (via email), attach your **proposal in PDF format**. It creates a more professional approach (use free PDF converters such a ***pdf955.com*** to easily convert Word Documents into pdf)

- **Make links** in your email **clickable** and check those links before you hit ‘send’.

- **Printed proposals** should be done in colour on heavy weight paper.

- **Follow up** within 2-3 days.

- Remember, people are busy and if you don’t give them what they want on first contact, they will most probably not contact you for more information when five, ten or fifty other proposals are giving them what they need.

All the best with your proposals.

Francis & Marietjie

ABOUT THE AUTHORS

Francis van Wyk has a Masters degree in Business Administration (MBA), a Masters degree in Science (M.Sc) and more than 13 years extensive business and management experience in the corporate and private environment. She started her Virtual Research business while living in the Middle East. Upon returning to South Africa she shared her vision: "*to assist virtual assistants and grow the virtual assistant industry in South Africa*" with Marietjie Steyn. Marietjie immediately realized that partnering with Francis can be the start of a new era for the virtual assistant industry in South Africa.

Marietjie Steyn an ex Personal Assistant, Real Estate Business Owner and Independent Bond Originator is working from home as a VA for more than 15 years. Marietjie has extensive marketing experience and has successfully built an elaborate client-base for her business. She almost perfected the marketing tool of "Word of Mouth" advertising as most of her clients are referred to her by previous, satisfied customers.

Francis & Marietjie founded ***Be-Virtual-Assistant-Wise*** in April 2009 to support aspiring and existing virtual assistants primarily in South Africa with all aspects of virtual assistance. Their proven practices and professional support shorten the learning curve significantly for new Virtual Assistants and as such facilitate a smoother business start-up process. They have also written an e-book "*Jumpstart your Virtual Assistant Business*" on the process of starting and running a successful VA business.

For more information on ***Be-Virtual-Assistant-Wise*** and how they can assist you with building your business, visit http://www.be-virtual-assistant-wise.com/