Exhibit & Event Industry

RFI

Best Practices

Practices to assist the corporate buyer in preparing and administrating a successful Request For Information initiative.

By Trade Show Exhibitors Association
and Exhibit Designers & Producers Association

This document was created by industry professionals representing two of the trade show and event industries' most respected organizations.

TRADE SHOW EXHIBITORS ASSOCIATION

TSEA represents more than 1,600 members from the United States and abroad. The mission of the association is to enhance the expertise of professionals in the exhibit and event marketing industry by providing knowledge, resources, and networking opportunities. For more information about TSEA and its benefits, contact 312.842.8732, e-mail *tsea@tsea.org*, or visit *www.tsea.org*. The association is also the sponsor of TS$^{2®}$ - Where Trade Shows & Corporate Events Begin. For more information on this annual conference and exhibition, visit *www.tsea.org/ts2*

EXHIBIT DESIGNERS AND PRODUCERS ASSOCIATION

The Exhibit Designers and Producers Association (EDPA) is an internationally recognized national trade association with more than 380 corporate members from 18 countries that are engaged in the design, manufacture, transport, installation and service of displays and exhibits, primarily for the exhibition and event industry. EDPA's purpose is to provide education, leadership and networking for the advancement of its members and the exhibition and event industry. In addition to providing regional industry education programs through its 11 chapters, EDPA organizes one annual meeting, tradeshow and golf tournament in a resort location for industry members and their suppliers. EDPA holds quarterly Board meetings and publishes a monthly electronic newsletter. EDPA also sponsors several annual industry awards. Website: *www.edpa.com*

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1. BACKGROUND FACTORS & CURRENT SITUATION

BACKGROUND

Throughout the last several years, numerous factors have converged to create a changed business environment. Because of these changes, there has been a dramatic increase in the use of the Request for Information (RFI) process; corporations are seeking new or additional services in the exhibit and event industry.

More suppliers than ever before are being asked to respond to a single RFI to help determine which suppliers can meet the needs of the corporation's trade show and event marketing challenges.

Although the reasons affecting a corporation's decision to issue an RFI vary, there are some recurring contributing factors:

Inside corporations

- Corporate consolidations and centralization efforts / Downsizing
- Reductions and re-allocation in event marketing spends
- Demand for accountability; ROI/ROO
- Rising involvement by corporate procurement in the identification and selection process of suppliers

Suppliers' influences

- Expanded and more sophisticated marketing is reaching broader customer bases
- Growth in online technologies are tearing down traditional geographic barriers
- New business models are offering intriguing alternatives to the corporation

CURRENT SITUATION

Both corporate customers and industry suppliers face several challenges regarding the creation, issuance and proposal in an RFI process. These challenges include:

Corporate customers: Trade Show Exhibitors Association (TSEA) members

- Creation of an RFI is time-consuming for both the event manager and procurement organizations
- Procurement organizations face steep learning curves in managing this type of spend (indirect vs. direct)
- Event managers are challenged with managing a complicated multi-department effort

Industry suppliers: Exhibit Designers and Producers Association (EDPA) members

- Responding to an increased number of formal RFIs is time-consuming and costly
- Off-target RFI documents negate communicating competitive advantages
- The flood of RFI opportunities leads to ill-advised choices of participation locations

2. TASKFORCE MANDATE/STRUCTURE AND APPROACH

TSEA and EDPA have recognized this situation as being a shared concern for their associations' memberships. In response, the Board of Directors from both associations authorized the landmark formation of a joint taskforce to develop industry best practices for the RFI process.

2.1 MANDATE

These best practices will deliver a simple, easy-to-use set of guidelines that: address the internal challenges of forming a corporate buying team, assist in the identification of potential candidates and address the creation and management of an effective RFI process for the exhibit and event industry. This process will provide both respective memberships a solid, benchmarked starting point, improving the process by reducing the costs and time deployed, as well as easing the burden of proposing and heightening the quality of information collected.

2.2 STRUCTURE

The joint taskforce was selected from volunteer members of both associations' Boards and their membership at large.

Participating firms include:

TSEA CORPORATE MEMBERS

Harris Schanhaut Manager, Events Marketing American Express Corporate Services	Sal Cavallaro Manager, Marketing Support United Technologies Corporation	Scott Lee Exhibit Manager/Coordinator Komatsu International
Andrew F. Dudek CMP, CME Telcordia Technologies Trade Show Manager	Pam Silver, CTSM Event Marketing Manager Rockwell Collins	Stephen Schuldenfrei President Trade Show Exhibitors Association (TSEA)

EDPA MEMBERS

Douglas Shockley Freeman National Director of Corporate Events	Jeff Korchinski VP Sales & Marketing Exhibit Concepts, Inc.	Alan Cordial Principal calan communications
Linn Bergmann Star Exhibits	Jim Weiss Federal Government & National Accounts Skyline Exhibits	Pete Dicks EDPA HQ
Doug Stevenson All Creation	Cindy Provencher Director of Strategic Business Development H B Stubbs Company	Brook Soss EDPA HQ

2.3 APPROACH

The taskforce was divided into sub-committees comprised of representatives from both organizations. Input and commentary was solicited directly by taskforce members through their peer networks. An opportunity for the industry at large to contribute was facilitated through an online blog hosted by *Exhibitor Magazine*.

After reviewing hundreds of questions across numerous corporate RFI, an effort was made to best determine the areas of investigation and types of questions that really make good sense for both buyer and supplier. The taskforce also looked at the mechanics of how the RFI evaluation process should be managed, with respect to lead times, proposal practices and suggestions for both initial input and post-evaluation feedback on the part of the issuing corporation.

This document in draft form was submitted to both associations' Boards of Directors for review and commentary prior to release.

2.4 ANTICIPATED OUTCOMES

TSEA members

Members will have access to industry standard best practices, helping to reduce the efforts and costs of producing an RFI and providing an improvement in the nature and quality of proposals obtained. This access will ultimately result in better selection processes.

EDPA members

Members will be more ensured that the process, as well as the nature and quality of the questions presented, effectively target the elements most critical in determining which supplier is best aligned to a corporation's needs. This improvement will result in suppliers' abilities to more effectively communicate their competitive advantages.

3. RFI / RFP / RFQ DEFINED

Effective use of an RFI prior to the issuance of an RFP can dramatically improve the quality of the responses from candidates who are asked to develop solutions for your design and production needs. You can be confident that every supplier who tenders a response is capable of delivering; and the suppliers know as well that their success is linked to creativity. Questions on their size, locations and business practices have all already meet your standards.

Alan Cordial
calan communications

An RFI is a fact-finding document issued to potential suppliers. An RFI in the tradeshow and event industry is generally conducted to qualify potential candidates before the issuance of a Request For Proposal (RFP) or a Request For Quotation (RFQ) process begins.

3.1. RFI

An RFI is a set of questions designed to probe the financial health, management structure, services, quality and billing practices of potential suppliers. Generally, an RFI is the first step employed in a procurement effort. Targeting a broad selection of suppliers, it allows for a quick assessment of their competitiveness. The value of an RFI is that it affords the corporation a very measurable and quantifiable "apple-to-apple" comparison, due to the respondents' requirement of answering the same set of questions. The use of the RFI affords potential suppliers a level of confidence that the corporate buyer is conducting the appropriate due diligence in advance of asking them to invest tens of thousands of dollars in a RFP proposal.

3.2. RFP

An RFP is a request on the part of the corporation to obtain proposals to a set of shared requirements. Suppliers are asked to supply solutions to operational or creative challenges. Proposals to an RFP can easily cost the supplier tens of thousands of dollars, win or lose. This tool should only be issued to pre-qualified candidates wherein the only evaluation criteria applied will be the quality, price and other deliverables attached to the proposal itself. Frequently the proposals, especially for creative challenges, will not afford the same level of quantifiable results that the RFI presents.

3.3. RFQ

An RFQ is used when the corporate buyer is looking for a quotation to deliver a specific product or service from a detailed set of specifications. This process calls for a comparison of the competitive proposals heavily slanted toward a cost of delivery. The RFI would have pre-qualified the invited suppliers with regard to ability to deliver, quality assurances and contractual terms.

Before you consider a release of your RFI, there is much to be done internally. The single most challenging part of the process is defining what you are really setting out to do. Establishing clear goals and obtaining consensus among the various stakeholders can prove problematic.

The best advice is to provide strong directional leadership and start early so you don't enter into the release phase of the process prior to obtaining internal agreement and approvals of what you are setting out to accomplish.

4. INTERNAL CONSIDERATIONS IN PREPARING THE RFI

4.1. UNDERSTANDING THE STAKEHOLDERS

It is important to identify who is on the selection committee. Their role/department within the company is generally a good key to understanding them.

The following chart provides a listing of roles that are often on RFI committees. It is important to note that the more information you uncover about the individual committee members on your project, the better your RFI will be able to garner team buy-in.

Role	What's Important	What They Look For
Procurement Manager Their job is to demonstrate value to the company by quantifying savings obtained.	**Cost: Cost Management** • Capital investment • Ongoing operational costs • Metrics to validate	• Savings on initial capital investment • Ongoing cost management initiatives • Opportunities to further increase savings • Savings metrics/reports
Role	**What's Important**	**What They Look For**
Brand Manager They live and breathe brand articulation.	**Brand Encounter: Integrity and consistency of the brand; they are the "Brand Police"**	• Translation of the brand into the tradeshow/event solution • Integrity and preservation of the brand

Role	What's Important	What They Look For
Product Manager Their job is to increase sales in their product line.	**Product placement: Visibility / Positioning of their Product** ◆ Obtaining high level of attendee awareness/interest ◆ Facilitating interaction with their product	◆ Emphasis on product placement ◆ Positioning and the staffer/attendee interaction and experience at work stations and product/demo areas ◆ A vendor who understands the product and the psychographics of the target audience
Role	**What's Important**	**What They Look For**
Senior Executives They are the ultimate authorities.	**Results: ROI for Shareholders** ◆ Improved efficiency, lower costs ◆ Wants solutions that are tailored to the company's objectives and/or challenges	◆ A value proposition which communicates expected and measurable results from the vendor
Role	**What's Important**	**What They Look For**
Marketing Communications Manager They are the voice of the company or product.	**Core Message / Theme: Delivering a clear and concise company brand message / theme** ◆ Validation of brand identity ◆ Differentiate the company brand	◆ Total integration of all marketing media (web-based, trade shows, printed collateral, advertising, sponsorships, etc.) ◆ Positioning the company or brand above the competition
Role	**What's Important**	**What They Look For**
Tradeshow / Event Manager They are concerned with managing all executables required for a successful event/tradeshow program.	**Value-Added: Delivering an experience that will drive sales or increase awareness** ◆ Metrics to validate ◆ Operating expenses ◆ Flawless execution ◆ Attracting the targeted/key customers	◆ An environment to deliver the customer an unforgettable experience ◆ A vendor that completely understands the potential of tradeshow/event marketing ◆ Demonstrated ability to execute
Role	**What's Important**	**What They Look For**
Advertising Manager They manage the company's advertising strategy.	**Message: Communicating the right message that informs and / or persuades** ◆ Awareness ◆ Connection with audience ◆ Measurable results	◆ A vehicle for increasing awareness ◆ A vendor that demonstrates core competency in selected media

4.2. ASSEMBLING YOUR TEAM

Keep in mind that individuals are unique and motivated by different things. The stakeholder chart is a good start but there is no substitute for uncovering your specific team's group dynamics and individual committee member's hot buttons.

Start off organized. As you assemble your RFI team, map out who they are and what part in the process they will play. A simple form to log the team members will be helpful, especially if you are working across multiple divisions and/or internal departments.

Name	Position	Top Concerns

4.3. COLLECTING INPUT ON WHAT YOU ARE SEEKING

While gathering information on the drivers of your key stakeholders is critical, do not overlook the obvious. Ask yourself exactly what you're trying to obtain. Often a large team will find itself well into the procurement process before they stop and list all that they are seeking. Use a form similar to the following to take a quick survey. The input will help determine the areas and questions that form the backbone of your RFI. By clearly establishing what you will need in the end, you are far more likely to select the best candidates in your RFI process.

Services and Offerings Information Collection Form

Services and Offerings	Demand Level		
	Must Have	Need Time to Time	Part of RFI
Strategic consultation in message development, branding			
Consultation to align event opportunities to strategy			
Show evaluation and selection			
Support in establishing, capturing and evaluating metrics			
Show space negotiations and payment			
Exhibit design			
Exhibit construction			
Graphic design			
Graphic production			
Portable systems			
Program management, show book fulfillment			
Transportation ordering, management			
Budget development and invoice consolidation			

E-tools for collaboration, online ordering, management			
Warehousing, asset management			
Domestic network of warehouses			
Field service ordering and payment			
Field service support, leadsman			
I&D labor coordination			
Public, industry and analysis relations support			
Content development for integrated messaging platforms			
Pre- and post-event direct marketing services			
Web site creation			
Email marketing			
Print production management			
Lead Management capture and reporting			
Staff evaluation and training			
Destination management (hotels for trade show staff)			
Presentation content development			
Presentation production, direction, editing			
On-site presentation delivery, director, technical director			
Presentation talent			
Audiovisual services on-site, platforms, crew			
Lighting and rigging services, lighting direction, crew			
Staffing support, trained subject matter experts			
Staffing support, reception, multi-lingual, crowd gathers			
Venue (hotel) evaluation and selection, contracting			
Destination management for private event attendees			
Educational track creation, registration			
Hospitality, food and beverage management and coordination			

5. CONSTRUCTING THE RFI

5.1 BUILDING BLOCKS OF THE RFI

Once you have completed the process of assembling your team and establishing a clear set of objectives for your evaluation process, you are ready to formulate the outline of the RFI. While there is no real limitation to what information might be sought, generally an RFI can be separated into five key criteria used to evaluate the business profiles of the vendor. A more detailed breakdown of possible areas of inquiry and aligned questioning can be found later in this document (Section 14, Suggested Topics and Associated Questions).

Supplier company profile

- Financial stability and resources
- Organizational structure
- Management structure

Capabilities / service / support

- Overall capabilities
- Account management
- Technology
- Creative background and experience
- Graphic design and production
- Project management
- Storage, warehousing and handling
- Traffic management
- Show services
- Installation and dismantle
- Audiovisual and additional services

Business practices

- Quality control/assurance
- Customer satisfaction

References

Pricing / payment options

5.2 SUGGESTED INFORMATION TO ASSIST YOUR POTENTIAL SUPPLIERS

In many cases the RFI is the first time a potential supplier is aware of your project, specific marketing support service or even your company. Your RFI document should therefore cover some basic information about your corporation, including:

Corporate snapshot

- Company overview / structure / business units / how you go to market
- Company mission statement
- Company value and goals
- Company history

Business model

- Purpose / reason for issuance of the RFI
- Projected budgets in the up coming RFP

- Terms and conditions

Project scope and services required

- Products and services sought
- Restrictions or concerns on business models
- Any geographic location or service requirements

Mechanics of the RFI process

- Project timeline
- Submission format
- Decision process
- Contact for questions and clarification
- Specific if questions and answers are shared or kept confidential
- Advise suppliers of the number of RFI packages released and the targeted final number to receive RFP

6. FACTORS TO CONSIDER IN DETERMINING NUMBER OF PARTICIPANTS

Whom do you consider a possible candidate? Your decision to include an individual supplier for consideration could be based on any number of factors, including:

- Suppliers who have in some way separated themselves in the market place
- Referrals from fellow employees and professional peers
- Internet searches
- Referrals from current suppliers in other service areas
- Referrals from incumbents
- Exhibit and event industry content shows and educational seminars
- Professional associations

Note: The decision of whether to include an incumbent supplier should be given serious thought. If the current supplier is not a viable candidate for whatever reason, be direct and inform them that they are not to receive consideration. Do so in advance; to release an RFI without prior notice to an existing supplier is unprofessional.

Once you have a pool of possible candidates, several factors might be taken into consideration in deciding how many suppliers to include. Above all, remember that each RFI released will incrementally increase your internal team's evaluation commitments.

6.1 LEVEL OF INVESTMENT DOLLARS BY YOUR COMPANY

Exhibit and event budgets vary wildly between corporations; what represents a substantial marketing spend on the part of one corporation would barely make the radar screen in another. Complexity, scope and value of the final RFP project you issue should heavily influence your decision on how many suppliers to include in the RFI. A key question when asking suppliers to extend a substantial effort in submitting a proposal to your RFI is, *"Is it* *fair and necessary to ask this many companies to invest their staffs' time and dollars when the successful companies will only acquire the right to spend more dollars in an RFP with a budget of the size we are considering?"* Common sense and an attitude of respect and fairness toward the supplier community should be your guides.

Unfortunately, this is not an exact science. The chart below reflects input solicited from the past experiences of members from both associations. It is intended ***strictly*** as a ***guideline***.

Some thoughts to consider as you review the grid in your decision process:

1) Some small percentage of suppliers will not respond or will provide incomplete information.
2) Each additional supplier included will increase the time and complexity of the evaluation process for your team.
3) On average, to complete an RFI, each supplier may take up to seven staff days.

6.2. TIME FRAMES

Time frames are especially critical when hard deliverables are needed to meet an established date such as an identified show for first use. Remember, the RFI evaluation is often only the first phase of a multi-step procurement process. To make time for the RFP and ultimately leave time for the supplier to execute, do not over-extend your team's commitments in the number of suppliers to be evaluated.

6.3. SITE VISITS

The RFI should clearly state if the process will include viewing the manufacturing facilities of the suppliers.

> *Note:* It is suggested to save this costly and time consuming step for the final selection of candidates in the RFP phase.

7. DRAFTING THE RFI

Anticipated Value of Services	Number of Suppliers to Include	
	RFI	RFP
Under $1,500,000	5-8	3
$1,500,000 - $ 3,500,000	9 -12	5-7
Over $3,500,000	12 +	7+

Organization and clarity are the watchwords for drafting an effective RFI. The clearer your questions and their intent, the more likely the proposals will provide the required information. The nature of information sought will for the most part shape the formatting.

In all cases we recommend:

- That the format follow an outline structure
- Have an easy to reference table of contents

- Provide page numbers
- Use numeric topic references

The following sections are a reference guide for formatting your RFI. (See the example RFI attached in the appendix.)

Title page

- Name of project and any reference information
- Name of company and contact information
- Deadline date

Introduction

Introduce the RFI with a brief explanation of what it is intended to discover; also, include a brief explanation of how each bidder and their respective will be evaluated.

> *Example:* <Your corporation> wishes to design, develop and acquire a custom exhibit system which projects its image as a technology-based, leading multi-national corporation and is flexible enough to encompass varying products and marketing objectives in a wide range of exhibits and trade shows.
>
> The first phase of this project will involve a Request for Information, which includes a review of your company's financials, management team, business practices, design and other critical business information. One or more proposals will then be selected to continue in follow-on phases to include, but not be limited to, final design and detailing, prototype development and testing, competitive bid for fabrication, deployment and logistical and operational procedures.
>
> Final selection will be based on an evaluation of your company, your people, your philosophy, your capabilities, your experience and your ability to contribute to a unique and successful exhibit system.
>
> If you are interested in being invited to submit a proposal, please complete the attached questionnaire and return to me by <date>.
>
> We appreciate any information you choose to supply; be assured it will be held in strict confidence. If you have any questions please call me at <contact information>. Thank you.

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- Topic headings with page numbers
- Use numeric references by topic

Intent to participate and/or decline proposal form

To ensure you have an adequate number of proposals, it is best to have the suppliers formally acknowledge their intent to participate. If a supplier chooses not to participate, your instructions should include the return of any previously forwarded information.

Example: <Company name> (hereinafter referred to as "Buyer") requests that all vendors formally acknowledge the receipt of this RFI package. Please use the included form to advise Buyer of your intention to bid. Vendors choosing not to propose to this RFP are required to communicate their decision by returning the RFP package with a letter of explanation, to Buyer within five (5) working days of the receipt of this package.

A draft example of intent to participate notification form can be found in the appendix.

Scope of the RFI

Your submission should include all information pertinent to your company's ability to meet <company name> requirements for the program. Invitees are required to provide as much information as possible to support your approach. A number of factors will be used to evaluate supplier candidates, including:

- Pricing structures
- Quality and delivery programs, and capability and assurance systems
- Cost tracking / reporting capability
- E-Business initiatives
- Minority and Women Business Enterprises (MWBE) programs
- Environmental, health and safety initiatives

Invitees should provide complete and thorough proposals to all RFI requirements to ensure that all aspects of the evaluation criteria are covered. <Company name> also encourages invitees to expand their proposals to include the details of any innovative ideas or potential alternatives that may be appropriate.

Proposal preparation cost

There should be a clear statement that all associated costs related to preparation of the proposal shall be the responsibility of the respondent.

Example: This RFI does not commit Buyer to reimburse respondent or any of its subsidiaries or agents for any costs incurred in the submission of a proposal.

State your right of refusal

Buyer assumes no contractual obligation, nor is any intended, by issuing this RFI.

Example: This RFI shall not be construed in any manner to create an obligation on the part of <NAME OF YOUR COMPANY> to enter into any contract or to serve as a basis for any claim whatsoever for reimbursement of costs for efforts expended by the invitee. Furthermore, the scope of this RFI may be revised at the option of <company name> at any time, or this RFI may be withdrawn or canceled by <company name> at any time. Therefore, <company name> shall not be obligated by any proposals or by any statements or representations-oral or written-that may be made by <company name>, and <company name> reserves the unqualified right to reject any or all submissions hereunder for any reason whatsoever.

Timeline detailing all steps in the RFI process

- Date to accept or decline
- Close date for questions
- Due date for proposals
- Notification date of RFI results by corporation

Discrepancies, omissions and additional information

- Your right to make modifications to, or completely withdrawal, the RFI

Example: <Company name> reserves the right to make changes to the RFI by issuance of one or more addenda or amendments and to distribute additional clarifying or supporting information.

While <company name> has endeavored to provide accurate information to the invitees, <company name> makes no such warranty or representation of accuracy.

- Consequences for failure on the part of the supplier to be forthcoming

Example:<Company name> reserves the right, but does not have the obligation, to verify all information provided by an invitee, including directly contacting the invitee's prior clients and prior personnel. Invitees must agree to provide and release necessary authorizations for <company name> to verify any of the invitee's previous work. Misstatements of experience and scope of prior projects may be grounds for disqualification of the invitee and/or the invitee's submission.

It is solely the invitee's responsibility to ensure that all pertinent and required information is included in its submission. Failure to adhere to the described format and to include the required information could result in disqualification of the invitee's proposal. <Company name> reserves the right to determine if a submission is incomplete or non-responsive.

If you make assumptions about the meaning or accuracy of information contained herein, you should state the assumptions in your submission. If you do not ask questions or clarify any assumptions, <company name> will assume that you agree with and understand the requirements in the RFI.

Invitees, by submitting information via proposals to this RFI, certify that the information has been independently prepared and submitted and that they have not been exchanged nor will they exchange any pricing, cost or other competitively sensitive information about any RFI product and/or service with any other invitee competing for this RFI.

Any exceptions to the terms, conditions, provisions and requirements delineated in the submission must be specifically noted and explained by the invitee. <Company name> will assume that any proposal to this RFI accepts all the RFI terms, conditions, provisions and requirements, except as expressly and specifically stated by Invitee in its proposal.

- Expectation of the period of time that you expect a tendered proposal to be valid

Confidentiality clause
Include a confidentiality statement to protect your company's interests. You may be sharing sensitive information with the suppliers in the RFI or later in the procurement process. You should involve your procurement and legal departments to insure that the necessary language is included.

A notice of mutual confidentiality is appropriate in an RFI process, especially with respect to any financial inquiries solicited from the suppliers.

> *Example:* By accepting this RFI, invitee agrees to keep confidential all information provided by <company name> to the invitee in connection with this RFI. Please notify <company name> immediately as to whether or not you are planning to respond to this RFI. In the event that you are not going to respond, please send back all hard copies of this RFI and / or delete electronic copies.

The invitee will not issue any public statements or otherwise disclose any information concerning this RFI, the RFI process, or their participation in the process without prior written approval of <company name>.

> *Note:* It is not uncommon to restrict access to information regarding financial data of privately held companies to only a procurement team member. This is one of those sections where a "standard" template is difficult to create.

> *Example:* This RFI and all confidential information related there to is considered proprietary to Buyer, and is submitted only for the purpose of soliciting a proposal from potential vendors. Proposals including, but not limited to, financial information will be used solely for the purpose of evaluation as they pertain to this RFI; responses will not be shared with any third party except as they pertain to this RFI and its evaluation.

Vendors may not use the Buyer name, or any of its trademarks in any advertisement or news release without the prior written consent of Buyer.

Attached is a copy of a non-disclosure agreement. Please attach a signed copy of the agreement with your proposal to participate in this Request For Information. Failure to return a signed copy will result in automatic disqualification of your proposal.

All corporations have their own perspective on the treatment of confidential company information. Round two of the RFP of a supplier search will result in your company providing information in order to obtain a viable proposal. In some instances, that information could be as sensitive as the release of an entirely new product or service into the marketplace.

We cannot encourage you strongly enough to involve your procurement and legal departments in the drafting of this section.

Inquiries and questions by suppliers
Provide a primary contact and their preferred contact information. A recom-

mendation is to use a single clearing point for all supplier questions in order to ensure appropriate proposals and parity among the bidders.

> *Example:* Contact by invitees regarding this RFI with any <company name> employee, contractor or consultant, other than the individual designated herein, prior to finalization of any purchase agreement resulting from this RFI is prohibited and is grounds for disqualification. Invitees will have adequate opportunity to obtain necessary information and/or schedule a site(s) visit(s) if deemed appropriate by <company name>.

Make a clear statement to the respondents regarding:

- Sharing of proposals with all suppliers
- Frequency of proposals: Will they be ongoing or at prescribed points in the process?
- Specifics on a format for submitting questions
- Final end date for submission of questions

Submission of proposal

- Deadline date/time
- Specific return address information
- The format desired for proposal submission
  - Electronic/hardcopy, or both
  - The number of proposal copies required
  - Delivery by email/registered carrier, or posted to a Web site

Late proposals

State your right of refusal to accept, or consequences for, late proposals.

Evaluation criteria

Any number of factors could be considered in the evaluation process, dependent upon the products and services being sought (Section 7, Drafting the RFI). Your evaluation criteria should correspond one-to-one to your evaluation factors.

The RFI submissions should go through a formal evaluation process by the project team. The project team should conduct their review using a structured rating format. You can create a matrix (see an example supplier evaluation form in the appendix) and adjust the weighted values to fit your specific circumstances. In the case or larger more involved RFI consider having a core element of your team do some preliminary evaluations in order to limit the time demands on the entire team. This core group might do an initial filtering based on non-compliance with the process, identified weakness in specific areas or failure to obtain a minimum score. The full team could then conduct an expanded review of this narrowed field.

> *Example:* <Company name> may ask any or all invitees to elaborate or clarify specific points or portions of their submission. Clarification may take the form of written responses to questions or meetings to discuss the RFI and/or the invitee's proposal.

In many cases, the use of various online tools and Microsoft Excel spreadsheet formatting allows for an automated roll-up and comparison view of the respondent's answers. This process allows a more systematic approach to selecting suppliers.

Note: Ideally, you should provide the suppliers with information on what areas are of particular interest and if you plan to apply weighted values to the proposal. It is not inappropriate to provide the suppliers a copy of your intended evaluation form in advance.

8. RELEASING THE RFI

Proposal timeframes will vary with the scope of the RFI. In general a 15 business day window is adequate for an RFI proposal provided there are no requests for creative development mixed in.

When sending out the RFI to the identified candidates provide the RFI in an editable electronic format such a locked MS Word Document or utilize a Web-based proposal system. This ensures that proposals are consistent for review and in many instances allows for summation and direct comparison of information through the use of spreadsheets and various embedded macros. It also reduces an unproductive burden on the respondents who would otherwise need to re-type all questions as well as their proposals.

Manage distribution such that all suppliers receive your RFI on the same day.

9. POSTMORTEM FEEDBACK TO SUPPLIERS

There exists a business "courtesy" obligation on the issuing corporation to offer some level of feedback. A potential level of complexity exists here as some suppliers will view this as an opportunity to try and reopen the submission process.

It should be made very clear in the initial RFI release that you will provide feedback on the proposals; however, in no case should this feedback opportunity be viewed as an ongoing negotiation. It is simply not fair to the other respondents or to your team's time invested in the evaluations.

At a minimum: Provide for a personal phone call or letter to each individual respondent giving them feedback of a nature that might help to improve their performance in the future.

Recommended proposal: Provide each vendor an evaluation scorecard with information indicating how they compared in specific areas of evaluation in the aggregate to the other respondents.

10. SUGGESTED TOPICS AND ASSOCIATED QUESTIONS

This is an extensive list of questions, provided to assist you with your RFI regardless of where your areas of interest are. These questions are not intended to be used, nor should they be, in their entirety. As you review the following topics and questions you will discover that there is an occasional repeat of some questions. This is the result of a natural overlap in content between areas. If your selection of topics results in recurring questions, simply select which topic area in which you would like to retain the question and delete it from the other area(s).

A sample RFI is attached in the appendix. If you review that document, you will see that questions were re-purposed, edited and in some cases altered to better fit the requirements of the issuing company.

10.1 COMPANY PROFILE

These are the kinds of things you will want to know about a company, so that your entire procurement committee has access to a snapshot view of the prospective supplier's credentials:

Financial stability and resources

Long-term viability of the prospective vendor is important; make sure ask the following questions:

- What is your D&B number?
- Might you provide your annual report?
- What have been your annual sales revenues for the last three years?
- What are your sales volume projections going forward three years?
- Are there any plans for new acquisitions, divestitures or sale of the company?
- Are you willing to share your "earnings before interest, taxes, depreciations and amortization" information?
- What are your targets for gross margins?
- Might you provide at least three vendor financial references?
- Might you provide banking and financial references?
- Might you provide profiles of the company's ownership?
- Might you list the types of insurance coverage, carrier and coverage amount and expiration date of your insurance policies?
- Is there any outstanding litigation or insurance actions involving your company?

Organizational structure

These are the kinds of questions you will want to ask so that your entire procurement committee has access to a snapshot view of the prospective supplier's credentials:

- What is your company name?
- Are you a public or private company?
- Is there a parent company, investor group or subsidiary?
- How many years have you been in business?
- What is the number of company locations? Are they sales, production and/or warehouse sites?
- What is your union status? With which unions in which cities do you currently have contracts?
- Do you have affiliations with any trade show industry associations? If so, which ones?
- What is your company's statement of strategic intent (your mission, vision or guiding philosophy)?

- Do you have any current strategic business partnerships with other suppliers that enhance your product/service offerings?

Management structure

You may want to know who runs the company-the key players, their experience and their roles in support of your program. It is likely you will be negotiating with them! Here's a good place to start:

- Please state the names of board members, officers and family as applicable.
- Please provide bios and contact information for the CEO, COO, CFO, president and division management.
- Whose signature will appear on our contract?
- Please provide bios of the core team members on my account, including all relevant background, experience, special skills or talents.
- Where is the company headquarters?

10.2. CAPABILITIES/SERVICES/SUPPORT

Overall capabilities short form

This particular set of questions is intended as a sort of short form synopsis of the *Capabilities/Services/Support* section. In many cases, it may prove to develop all of the response information you need to make your selection of potential suppliers. If you require more in-depth evaluation, select the capabilities you wish to procure from the following topics.

- What makes your company unique from your competitors?
- Do you provide market, competitive, brand or "at-event" research?
- What processes are involved in concept research? Do you charge for creative development?
- Is your 3-D design done in-house, on an intra-divisional basis and/or freelance?
- Is graphic design done in-house, intra-divisional and/or freelance?
- Is graphic production done in-house? What, if anything, is subcontracted?
- Do you provide account management? If so, of what does that consist?
- Is project management provided? If so, by whom? Are project management and detailing separate functions?
- Do you do fabrication at your facility? If not, where? If elsewhere, do you pick up the cost of travel to client viewings?
- Provide a listing of all union contracts to which you subscribe.
- Provide an overview of how technology is used throughout your organization.
- Do you have customer interfacing technology? If yes, list and describe any online services / capabilities you have.
- Please list which, if any, of the following you are involved in: exhibits, events, retail environments, museums, executive briefing centers, corporate lobbies, mall kiosks, road shows, etcetera.
- Do you have a computerized inventory management system? If so, is it based on bar codes or some other platform?

- What do you charge for inbound and outbound inspection? Are there different levels and corresponding pricing?
- Please list all storage locations (map preferred).
- Describe your insurance coverage pertaining to the contents and storage in your warehouse.
- Do you have national freight contracts?
- What discount do you achieve through these contracts?
- What is your mark-up and / or hourly charge for managing freight?
- Do you solicit competitive bids for each shipment?
- Please list the creative services do you provide, if any: props, audiovisuals, lighting, staging, etcetera.
- Do you have meeting planners on staff? Do you handle destination management?
- How are theme development, scripting and talent managed? Do you have producers, creative directors and writers on staff?
- Do you provide ROI, ROO or ongoing program performance measurement?
- What alliances, business partnerships or affiliations do you have with exhibit houses in (fill in international areas of geographic interest)?

TOPICS

You may be seeking a partner with capabilities that enable them to provide for all of your needs, or you may be using an "a la carte" approach. These questions probe for the scope of the prospective supplier's competencies and service offerings:

Account management

Good account management is vital. Who will lead your team? Whether you tend to do fewer, larger shows or frequent shows, much of your day-to-day contact will be with your account management team. Here are some questions that are relevant:

- Who will be my primary point of contact day to day? (Please provide a bio for this individual.) And does this person have experience with this type of account or my industry? And who backs up this person when needed?
- What redundancies are built in, in the event of an emergency?
- What is the average cost of account management as a percentage of the typical project?
- Do account support personnel travel to each show? If so, who pays for the travel expenses?
- What is the role of the account representative at-show and post-show?
- Do you perform routine post-show debriefings / evaluations?
- Are there annual or quarterly account performance reviews?
- Is there a routine means of obtaining client feedback, such as a show service / performance questionnaires?
- Do changes on the show floor require the signing of a priced change order?

- When, if ever, is any work performed on a time and material basis?

Technology

This section investigates the company's understanding, application and experience with various technologies as business tools and enablers:

- Provide an overview of how technology is used throughout your organization.
- Do you have customer interfacing technology? If so, please list and describe any online services / capabilities you have.
- Describe your ability to provide clients with historical information pertaining to inventory, shipments and budgets.
- Describe in detail any future plans for subsequent automation; and specify current status and target dates for deployment.
- Who owns the data warehoused in your systems? What arrangements exist should we need to move this data?
- Are your systems proprietary? What are your training and help desk support arrangements? Who pays for these costs?
- Please describe your security, backup and disaster recovery plan as they relate to technology.
- Provide the contact names and phone numbers of three customers currently utilizing your online program.

TASKFORCE NOTE:
Today, more than ever before, the question of intellectual property rights should be clearly understood before you enter into any contractual agreements.

Creative background and experiences

Design is more than talent; it is asking the right questions and having innovative processes in place to develop optimal creative solutions. These are some questions you may want to ask:

- What is the structure of your design department? Who leads this function? Who else will be on our design team? (Please provide bios for these individuals.)
- What will be your creative problem-solving techniques and design processes for developing new projects and providing ongoing solutions as our program evolves?
- What type of technology do you use? What type of computer equipment and output devices are used?
- Do you use CAD? If so, which platform?
- Can you provide a fly-through?
- Can anyone on your design staff hand-sketch or render?
- With which computer software programs are you proficient?
- What percentage of design is done in-house or in your division, versus outside?

Graphic design and production

If your program requires these services, your RFI should include the following questions about this design function:

- Do you provide and maintain electronic inventories of graphics for your clients? Does this client have a Web presence?
- With what types of hardware and software are you proficient?
- Do you use Adobe and Photoshop, among other programs?

- What are your methods of graphics production? What is done in-house versus subcontracted?

Project management

Project management is vital to the ongoing working relationship. The project management team translates the creative vision into reality through production. Here are some questions you may want to ask about this function:

- What is the scope and role of my project manager?
- How many years of experience do these individuals have?
- How much client contact does the project management team have? Is it direct? Is there an online component for dialogue?
- If you have an online package for communication, what is it called? Is it off-the-shelf or proprietary? How does it work? (Please provide sample screens and be prepared to demonstrate its functionality.)
- Might you provide examples of a typical timeline for construction?
- What CAD software is used?
- What is the average cost of project management as a percentage of the average project? What is the hourly rate?
- Is the project manager available for conference calls and meetings regarding work-in-progress?
- Are a complete set of drawings including floor plans, set-up and detail drawings provided for every project? Is the client given their own set?
- If there are challenges on the show floor, what is the availability of the project manager for issue resolution? Is there a back-up manager in place?

Storage, warehousing and handling

Will you have to store your exhibit properties somewhere? If so, rates vary widely and some companies offer more than one storage facility. Some questions you may ask regarding storage are:

- What is your storage rate and how is it computed? (Please give the cost for storing a 4'x4'x8' crate.)
- What is your storage rate for skids and carpet bags?
- What is the size of your warehouse? Might you provide photos?
- Do you have a computerized inventory management system? Is it based on bar codes or some other platform?
- Do you have access to subcontracted or ancillary storage space if needed?
- What is your network-wide square footage storage capacity?
- What do you charge for handling in and out?
- What do you charge for inbound and outbound inspection? Are there different levels and corresponding pricing?
- Might you list all storage locations? (Map preferred.)
- Might you list any international locations?
- Please describe your insurance coverage, pertaining to the contents and storage in your warehouse: Do you have a sprinkler system? How many fire extinguishers are on premise?
- Might you describe your security protocols?

Traffic management

You may want your prospective vendor partner to schedule, book and oversee shipping to and from venues locally and nationally. These questions involve this function:

- What system do you use for cost estimation?
- Do you have national freight contracts? If so, with which carriers? Are these van lines or common carriers?
- What are the rates for shipping? Please provide examples at the ¼-, ½-and full-trailer level.
- What discount do you achieve through these contracts?
- What is your mark-up and / or hourly charge for managing freight?
- Do you use FedEx or some other express company? What is your markup on this type of shipment?
- Do you have a special air freight carrier? If so, what is your handling rate and your mark-up on this service?
- Is your local freight in-house or subcontracted? (Please quote typical rates and mark-ups.)

Show services

While some companies manage show services themselves, most find value in delegating this time-consuming function to their exhibit / event house. If you have concerns regarding the ordering and management of show services, these are relevant questions:

- Who at your company handles the ordering of show services? Do you have a special show services department?
- If requested, are you willing to deal directly with the show contractor to procure show books, answer questions and resolve issues?
- What is your mark-up and / or hourly charge for this service?
- How do you handle prepayments and deposits?
- Are you willing to allow your client to be billed directly even though you may do the leg work? If so, what is the charge, if any, on your end for this?
- How are late penalties handled if the delay is on your end?

Installation and dismantle

Installation and dismantle support is critical for timely and proper execution on show site. You will probably want to ask at least some questions as to how this function is handled by your potential vendor, such as:

- Do you have your own internal I&D staff? If so, who would be handling my business? Please provide a list of city managers, supervisors and my lead personnel.
- If you don't do your own I&D, from where is your labor sourced?
- In what markets do you offer turnkey supervision and labor? Where do you subcontract?
- Who are your I&D subcontractors? (Please include company names, references and number of years in partnership.)
- Do you offer guaranteed labor estimates / contracts or is pricing approximate and variable? If so, what is the typical range +/-?

- May we use our own labor contracted directly? If so, would you provide supervision under these circumstances?
- What is the on-site management structure for I&D? Is there always a show manager? Is there a service desk? Is there always a gang box or cage or shop close at hand with additional/emergency supplies?
- What is your percentage markup for supervision in each major city?
- What union contracts do you subscribe to?
- What is your markup on labor?
- What are your labor and supervisory rates for each major market in which we have shows? (Please show how these rates compare to show book rates.)

Audiovisual and additional services

If you have occasion to use audiovisual services, you may want to probe for some information regarding how such services are handled. These questions may help:

- Do you have an internal audiovisual staff / function?
- Do you have rental equipment in-house?
- What kind of equipment can be provided?
- If you use subcontractors, which ones are they? What is the markup on labor and equipment?
- Do you quote guaranteed prices?
- What is the rate for an on-site technician? How is overtime handled, if needed? Is it charged through or absorbed?

10.3 BUSINESS PRACTICES

Business practices and processes can increase operational efficiencies, quality and overall customer satisfaction.

Quality control/assurance

If quality control is a hot button, or you desire formalized communication to insure you are on the same page with your vendor team, you may want to ask some of these questions pertaining to production management:

- What CAD platforms are used?
- Might you provide samples of fabrication, detail drawings, set-up prints and floor plans?
- What process is used for the approval of final drawings? Is there a formal client sign-off on all drawings? Is there an online digital approval component available?
- Might you provide samples of a contract, a work order, a change order and a final invoice, including additional billing?
- How is a change order managed with respect to pricing changes?
- What are typical or required lead times for all production items, including graphics and other non-shop work?
- Do you use project flowcharts schedules to manage your production process? (If so, please provide examples. If not, how do you manage scheduling?)

- What accountability measures do you have in place to insure that what has been estimated and contracted has been executed to the full satisfaction of the client?
- What other quality control measures do you have in place?
- What type of employee training and evaluation do you do?
- What product or service warranties do you offer?
- How is sub-standard work-remedial or corrective-handled?
- What are your exhibit maintenance rates? Do you offer options?
- Do your clients have access to your shop and your subcontractors' facilities at any time during production?
- Are there charges for in-progress viewing or a trial set-up? If so, what are they and what are their definitions?
- Are there specified workmanship standards?
- Is there a documented and verified closed-loop corrective action system?
- What is the approval process for detail drawings and floor plans?
- What quality control measures are in place? What quality control elements have you put in place in the last year or do you plan to implement in the next year?
- Do you have a quality improvement / development program ongoing?
- How do you keep current with the latest technology?
- How do you keep current with the latest industry trends?
- Do you offer guarantees of workmanship, delivery or special warranties of any kind, including those covering "unusual" wear and tear on exhibit components?
- What kind of insurance coverage do you have pertaining to faulty construction or mishaps at show site?

Customer satisfaction

- Who at your company has responsibility for customer satisfaction?
- How do you evaluate your current client satisfaction?
- How do you add value for your customers?
- How does your company stay up to date with current practices and industry trends?
- Is there a regular means of customer feedback?
- Is there an online means of customer feedback?
- Is there an annual, quarterly or monthly account review?
- How do you handle and remediate customer complaints?

10.4 REFERENCES

It is important to hear from current customers in regards to how well the candidate company serves their needs. Here are some good leads for receiving telling information:

- Please provide three current client references (at least one should be a contact with the current prospective account team).
- Please provide the names and contact information of three ex-clients.

- Please provide a list of clients in our industry with whom you currently work.
- How many clients' exhibits are currently stored at your facility?
- What is the average length of client relationship?
- Please discuss your experience with trade shows, conferences and associations relevant to our business.
- Please provide photographs of work or a project portfolio.
- Include any customer comments or endorsements you may wish to add.

10.5 PRICING/PAYMENT OPTIONS

Price is always important as a part of the price/value relationship, as are pricing philosophies and staying within your budget parameters. You will undoubtedly want to ask some of the following questions and request some of the following information pertaining to cost structure (see appendix for rate and cost sheets):

- Please provide a comprehensive rate sheet including creative, management, shop and field services, as well as warehousing costs.
- Show all these rates by each market, pertinent to the services you offer in each.
- Explain the structure for the application of overtime labor charges.
- Clearly state if your "quoted" pricing will absorb overtime charges not resulting from our failure to meet stated deadlines.
- Provide a sample estimate, contract and invoice.
- What is your average turnaround time for an estimate?
- Please list any penalties associated with missing lead times.
- Please list all circumstances under which overtime charges could be encountered.
- Please describe any special contracts or discounts you offer.
- Please provide a sample invoice.
- What is your average time to billing after the close of a show?
- Is online management of estimate approval, change orders, invoice review and payment available?
- Do you offer discounts for early payment?
- What are your payment terms?
- Do you bill by project, monthly or quarterly?
- Do your statements break down time and materials separately? Can they be itemized as our needs dictate?
- Please provide some sample projects/new builds, including photos, floor plans and budgets.
- Describe how the company would proactively suggest solutions, ideas and innovations to lower costs.
- Provide an example of how you have helped a customer reduce costs, without reducing impact/return of their program.
- Identify areas where your costs have increased/decreased during the past 12 months. What were the percentage increases/decreases for these areas?

Hourly rates can be misleading. Suppliers may state low hourly rates but require nearly twice the hours to produce. While looking at rates offers some value, buyers should be very cautious of placing too much weight on this one variable. Ideally, when an actual scope of work is defined it would be most fair and in the buyers best interest if suppliers were required to provide a quote on the total cost of a job including estimated hours that they must honor.

Jeff Korchinski
ExhibitConcepts

- Describe your check-in/check-out process and associated costs.
- Describe in detail each level of inspection offered and the process to support it.
- Do you offer client program pricing? Describe how this works. List all costs associated with program pricing.
- Provide cost for storage (cubic footage) per year. When do you expect your next price increase for storage? What will that increase be?
- Describe your mark-up policy: What constitutes a mark-up (include furniture, lighting, carpet and other off-the-shelf items)?
- Please list all the freight carriers you have contracts with. Who is your primary carrier (include the negotiated rates you have with these carriers)?
- Are you willing to let us use our own carriers? If so, how would you help in the coordination process?
- Describe your design process for new build and booth layouts (include the fee structure).
- What are your billing terms?
- Do you offer an "early-payment" discount?
- Please attach copies of your standard terms and conditions.
- Please attach a copy of your standard confidentiality agreement.
- Please provide an example work order.
- Please provide an example invoice.

Exhibit & Event Industry

RFI

Best Practices

Appendix

A1. SAMPLE RFI

A2. INTENT TO PARTICIPATE PROPOSAL FORM

A3. RATE SHEET

A4. COST SHEET

A5. VENDOR EVALUATION FORM

1. SAMPLE RFI

YELLOW CORPORATION

Request For Information
Trade Show Program Consolidation
DUE DATE: xx/xx/xx

Yellow Corporation
Corporate Communications
500 Blue Run Road
Ashland, IA 00000-999

Table of Contents

CONFIDENTIALITY

Recipients of this agreement agree to hold all information they may obtain in the course of this proposal strictly confidential.

Attached is a copy of the Yellow Corporation non-disclosure agreement. Please attach a signed copy of the agreement with your response to this request for information.

Failure to return a signed copy will result in automatic disqualification of your proposal.

INTRODUCTION

Objective

Yellow Corporation desires to procure a single source vendor solution to support its Americas Trade Show Program for both its commercial and government systems segments. Yellow Corporation's fundamental goal in the request for information (RFI) process is to determine which organization(s) Yellow Corporation will want to proceed with in developing a mutually beneficial relationship.

The goals of our Americas supplier rationalization process are:

- Maximize operational efficiencies by streamlining processes
- Leverage our buying power to secure the most competitive pricing in the market
- Enhance collaboration and communications with our internal customers

Key supplier business principles required for a successful relationship with Yellow Corporation:

- Quality and service levels that meet and exceed our specifications
- Product / service offerings that provide a strategic advantage to Yellow Corporation
- Proactive cost saving recommendations and initiatives
- Commitment to continuous process improvement initiatives

Yellow Corporation Company Overview

Yellow Corporation is a leader in the design, production and support of all kinds of things and solutions for commercial and government customers worldwide. For fiscal year 2004, the company anticipates revenues to be in the range of $4.8 billion to $5.85 billion. In January 2004, People magazine selected Yellow Corporation as the best-managed maker of things in America.

Government Systems is focused on provides products and systems aimed at the U.S. government, foreign militaries and manufacturers of military platforms.

Commercial Systems provides a full line of aircraft and ground support systems directed towards air transport. business and regional manufacturers and airlines worldwide.

Scope of Work
See attached show schedule, inventory lists and booth photos

The scope of this program consists of but is not limited to:

- Trade show marketing services
- Exhibit design
- Graphic design
- Graphic production
- Custom construction
- Custom exhibit refurbishment
- Rental exhibits
- Show services coordination
- Installation and dismantle services
- Transportation
- Registration/housing coordination
- Portable program management
- Lead management
- ROI/ROO measurement
- Literature/premium fulfillment
- Product/equipment warehousing
- Storage of all exhibits (approximately 2385 cubic feet)

Minimum requirements:

- Dedicated account team
- Proven experience with programs similar in size and scope to Yellow Corporation
- Proven experience managing the design and production of both custom and portable displays
- Proven experience in coordinating the logistics of both custom and portable programs
- Proven online ordering capabilities
- Field management capabilities nationwide
- Access to multiple storage facilities nationwide
- Proven, experienced partners in South America
- Ability to customize Yellow Corporation programs and provide program pricing
- Inventory management capabilities
- Centralized logistics, inventory and graphics database

PROPOSAL PREPARATION AND SUBMISSION

Submission of proposal

Yellow Corporation requires an electronic copy and (NUMBER OF HARD COPIES) proposals. Both your electronic and hard copy proposals must be received by (DATE & TIME). Submit your electronic version in Microsoft Word or as a .PDF file to (EMAIL ADDRESS) Send a hard copy to the following address:

Yellow Corporation
Attn: (NAME)
Corporate Communications
500 Blue Run Road
Ashland, IA 00000-999

RFI Timeline

Key Event	Date
Distribute RFI to suppliers	
Final date for supplier questions	
All responses to questions issued by <Name of Corporation>	
Suppliers submit proposals	
Top suppliers are contacted and invited to Yellow Corporation corporate office for live presentations	
Suppliers presentation to Yellow Corporation	
Site visits to suppliers facilities	
Yellow Corporation selects preferred supplier and notifies all suppliers	

Late Proposals

Any proposal submitted after (proposal date and time) may be rejected by Yellow Corporation.

Content of Proposal

Responses to this proposal should provide a clear, concise description of your abilities to satisfy our requirements in sections 3.0 and 4.0. Unless specifically requested, literature, graphics and promotional materials should not be included in your proposal package. Failure to comply with this request may result in disqualification.

Suppliers' Costs for Proposal Development

The cost for development of proposal is entirely the supplier's responsibility and shall not be chargeable to Yellow Corporation.

Supplier Questions/Inquiries

Email all questions/inquiries concerning this RFI to (Name) at (EMAIL Address). All questions/inquires must be submitted no later than (DATE/Time). Any proposals from Yellow Corporation may be distributed to all vendor participants at our discretion. Our proposals will be emailed by (Date).

At the close of the RFI we will offer feedback on your proposals. This is not to be considered an opportunity to alter your proposals or to re-open the submission process.

SUPPLIER CAPABILITIES

Please provide responses to the following:

Company profile

A. Supplier name and primary address
B. Primary contact name and contact information
C. Dun & Bradstreet number
D. Provide copy of latest annual report. If not publicly held, submit similarly prepared information on the organizational and financial structure of your company. Include business classification (large, small, minority- or female-owned).
E. Provide annual sales revenues for the past three years.
F. Does your company have an open book policy, whereupon we may audit your financial information upon request?
G. Provide the total number of facilities including locations and type: sales/design, manufacturing or warehousing.
H. Identify and describe the industry experience of your executive management.
I. Describe the structure of your company in terms of divisions, departments or other functional groups. If your company is a division or subsidiary of another company, show how your company integrates within that organization.
J. Is the company a union shop? If yes, please list the union and contract expiration date.
K. List the types of insurance coverage, carrier, and coverage amount and expiration date of your insurance policies.
L. Define your disaster recovery plan, should your facility and/or equipment be disabled.
M. Describe your reimbursement policy if product/service failures occur.
N. Describe any current strategic business partnerships with other suppliers that enhance your product and/or service offering.
O. Describe the process you use to choose/select subcontractors.
P. How do you measure and monitor the quality of these supplier's product/service offerings?
Q. Provide three customer names, addresses and phone numbers for references.

Capabilities / service / support

A. What makes your company unique from your competitors? What competitive advantage and/or specialization do you feel your company possesses?
B. What are your organizations' normal business hours? Describe your accessibility for after-hour emergencies.
C. Describe how you would assign responsibilities and structure your account team to meet Yellow Corporation's needs.
D. How do you get to know your new customers?
E. Describe your graphic design and production capabilities. What jobs need to be subcontracted versus what you can do in-house?
F. Describe your company's inventory management system.
G. Describe your company's invoicing process.
H. Provide the number of North American events / tradeshows you manage in a year.
I. Provide the number of South American events/tradeshows you manage in a year.
J. What alliances, business partnerships or affiliations do you have with exhibit houses in South America?
K. Provide an overview of the technology that is used throughout your organization.
L. Do you have customer interfacing technology? If yes, list and describe any online services / capabilities you have.
M. Describe your ability to provide clients with historical information pertaining to inventory, shipments and budgets.
N. Describe in detail any future plans for subsequent automation - specify timelines and target dates.
O. Provide the contact names and phone numbers of the customers currently utilizing your on-line program.

Business Practices

A. Who at your company has responsibility for customer satisfaction?
B. Describe your approach to service.
C. How do you evaluate your current client satisfaction?
D. Describe your service guarantee.
E. Quantitatively describe your company's ability to meet deadlines on time and maintain your company's reputation for high quality services.
F. Describe the corrective action system with which your company handles customer complaints.
G. Describe the continuous improvement efforts your company has in place.
H. Explain how you add value for your customers.
I. Describe how your company stays up to date with current practices and industry trends.

SUPPLIER PRICING

A. Describe how the company would proactively suggest solutions, ideas and innovations to lower costs.

B. Provide an example of how you have helped a customer reduce costs, without reducing impact/return of their program.

C. Identify areas where your costs have increased/decreased during 2003. What were the percentage increases/decreases for these areas?

D. Describe your check-in / check-out process and associated costs.

E. Describe in detail each level of inspection offered and the process to support it.

F. Do you offer client program pricing? Describe how this works. List all costs associated with program pricing.

G. Provide cost for (number of cubic ft.) storage per year. When do you expect your next price increase for storage? What will that increase be?

H. Describe your mark-up policy, specifically what constitutes a mark-up: furniture, lighting, carpet and other off-the-shelf items.

I. Please list all the freight carriers you have contracts with. Who is your primary carrier? Include the negotiated rates you have with these carriers.

J. Are you willing to let Yellow Corporation use its own carriers? If so, how would you help in the coordination process?

K. Describe your design process for new build and booth layouts. Include the fee structure.

L. What are your billing terms?

M. Do you offer a prompt early payment discount?

N. Please complete the table below indicating hourly billing rates by classification.

Labor Type	Straight Time	Overtime	Double Time	Comments/ Responsibilities
Design				
Graphic Design				
Graphic Coordinator				
Account Management				
Project Management				
Carpenter				
Electrician				
Warehouse				
I&D Supervisor				
Other (Identify)				

O. Explain the structure for the application of over-time labor charges.

P. Clearly state if your "quoted" pricing will absorb overtime charges not resulting from our failure to meet stated deadlines.

Q. Describe in detail when Yellow Corporation would be charged for each of the above services? Complete the following table.

Cost Sheet

Mark-up on:	Percentage	Comments/Explanation
Freight		
Show services		
I&D		
Booth space		
Outsourced graphics		
Talent or traffic building services		
Material		
Check-in/Check-out (Inspection):	**Per Crate/Skid**	**Comments/Explanation**
Per crate		
Per skid		
Move-in/Move-out:	**Cost**	**Comments/Explanation**
Handling charge - 1st crate		
Handling Charge - 2nd crate +		
Handling charge - skid		
Handling charge - portable case		
Carpet roll		
Other (please explain)		
Storage:	**Cost**	**Comments/Explanation**
Storage per ft. (square /cubic)		
Aisle or premium space charges		
Locked storage charges		
Labor:	**Show-site**	**Warehouse**
Graphic designer		
Graphic designer		
Designer		
Carpenter		
Electrician		
I&D		
Supervision charges		

Miscellaneous:	Cost	Comments/Explanation
Fees to help exhibitor look through properties		
Fulfillment charges		
Overall management fees		
Project mgmt., acct. mgmt. fees		
Bar coding charges		
Online set-up charges		
Online maintenance / running charges		
Tracking and / or reporting charges		

CONTRACT TERMS AND CONDITIONS

Please respond to the following questions and provide examples of all requested material.

- Clearly state if your "quoted" pricing will absorb overtime charges not resulting from our failure to meet stated deadlines.
- Provide a sample estimate, contract and invoice.
- Please list any penalties associated with missing lead times.
- Please list all circumstances under which overtime charges could be encountered.
- Please describe any special contracts or discounts you offer.
- What are your payment terms?
- Do you bill by project, monthly or quarterly?
- Please attach copies of your standard terms and conditions.
- Please attach a copy of your standard confidentiality agreement.
- Please provide an example work order.
- Please provide an example invoice.

2. INTENT TO PARTICIPATE NOTIFICATION FORM

Intent to Participate Notification

FROM: Your Company Name
Company Address

TO: RFI Primary Contact Name
Contact Information

RE: Intent to Participate

RFI Name

Reference Number

Proposal is Due: xx/xx/xx

Send all proposals to: Where and how to deliver proposals

Name of Responding Company: ___________________________

- ☐ We have read your attached RFI. We understand and accept the terms and conditions as stated. In agreement with all provisions contained within your RFI, we will be submitting a proposal.

- ☐ We have read your attached RFI. After careful review we have elected to decline the opportunity. Per the instructions, enclosed you will find all prior documents and communications sent to us.

Reason for declining: (Optional)
____
____
____
____
____
____

Sincerely,

Name
Title

3. RATE SHEET

Labor Type	Straight Time	Overtime	Double Time	Comments/ Responsibilities
Design				
Graphic design				
Graphic coordinator				
Account management				
Project management				
Carpenter				
Electrician				
Warehouse				
I&D supervisor				
Other (identify)				

4. COST SHEET

Mark-up on:	Percentage	Comments/Explanation
Freight		
Show services		
I&D		
Booth space		
Outsourced graphics		
Talent or traffic building services		
Material		
Check-in/Check-out (Inspection):	**Per Crate/Skid**	**Comments/Explanation**
Per crate		
Per skid		
Move-in/Move-out:	**Cost**	**Comments/Explanation**
Handling charge - 1st crate		
Handling Charge - 2nd crate +		
Handling charge - skid		
Handling charge - portable case		
Carpet roll		
Other (please explain)		
Storage:	**Cost**	**Comments/Explanation**
Storage per ft. (square /cubic)		
Aisle or premium space charges		
Locked storage charges		
Labor:	**Show-site**	**Warehouse**
Graphic designer		
Graphic designer		
Designer		
Carpenter		
Electrician		
I&D		
Supervision charges		

Miscellaneous:	Cost	Comments/Explanation
Fees to help exhibitor look through properties		
Fulfillment charges		
Overall management fees		
Project mgmt., acct. mgmt. fees		
Bar coding charges		
Online set-up charges		
Online maintenance / running charges		
Tracking and / or reporting charges		

5. VENDOR EVALUATION FORM

Vendor Selection Scorecard

Vendor	Quality	Financial Stability	Support Capacity	Pricing	Systems	Reputation	Total
Weight	4	3	2	3	1	2	
Company W							
Company X							
Company Y							
Company Z							

Instructions
Rank each supplier, based on proposals to RFI and on face-to-face presentation, on a scale of 1 to 5 (1 = not confident that this candidate meets requirements, 5 = very confident candidate meets requirements).

Once all rankings are in place for each of the six categories, multiply the rank you assigned for each candidate in each category by the weight assigned. This will give you a number that is the same, or higher than the one you assigned. Once all rankings have been calculated, add the total for each column, and place that number in the "total" field.

The best that any candidate can do is 75 points. The worst any candidate can do is 15 points.

Once everyone has calculated the totals, we will aggregate the numbers in order to represent the teams' overall impression of the suppliers. Conversations with the team members around the results will be made, and these results will steer conversations as to who are the most appropriate candidates.