

## Workbook: Designing a Strategic RFP

### Purpose:

This workbook is designed to help you craft an effective Request for Proposal (RFP) for your strategic planning project. By following this structured guide, you will ensure clarity, focus, and the ability to attract responses that are aligned with your organization's needs. Use the spaces provided to develop your thoughts and finalize each section of your RFP.

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### 1. Define the Purpose of Your Strategic Plan

**Context:** Start your RFP by explaining why you are undertaking this strategic planning project. Clearly articulate the drivers behind this initiative and what success looks like for your organization.

#### Worksheet:

- What are the key challenges or opportunities prompting this project?  
*Example: Adapting to market changes, improving alignment, or addressing internal inefficiencies.*

Your answer:

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- What outcomes do you hope to achieve?  
*Example: Unified vision, measurable growth, or enhanced resource allocation.*

Your answer:

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### 2. Define the Scope of the Project

**Context:** Provide a clear outline of the expected phases and boundaries of the engagement. Ensure flexibility to allow consultants to bring their expertise and creativity.

#### Worksheet:

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- What are the major phases of the project?  
*Example: Discovery, stakeholder engagement, analysis, strategy development, and implementation planning.*

Your answer:

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- Are there specific approaches or methodologies you prefer?  
*Example: SWOT analysis, balanced scorecard, or open to innovative methods.*

Your answer:

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### 3. Clarify Stakeholder Involvement

**Context:** Identify who will be involved and how. This includes leadership, staff, or external partners whose input is critical to success.

#### Worksheet:

- Who are the key stakeholder groups?  
*Example: Executive team, department heads, board members.*

Your answer:

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- What role will each group play in the process?  
*Example: Providing input, attending workshops, or reviewing deliverables.*

Your answer:

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- Are there any known dynamics or challenges to consider?  
*Example: Misalignment among leadership or resistance to change.*

Your answer:

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#### 4. Specify Deliverables and Outcomes

**Context:** Detail the tangible outputs you expect and the broader goals they should achieve.

**Worksheet:**

- What specific deliverables do you require?  
*Example: A written strategic plan, an implementation roadmap, or a metrics dashboard.*

*Your answer:*

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- What broader outcomes should the deliverables enable?  
*Example: Alignment, prioritization, measurable growth.*

*Your answer:*

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#### 5. Outline Evaluation Criteria

**Context:** Clearly communicate how proposals will be assessed to help respondents tailor their submissions.

**Worksheet:**

- What qualifications and experience are you seeking?  
*Example: Industry expertise, experience with similar-sized organizations.*

*Your answer:*

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- What aspects of their proposed approach matter most?  
*Example: Alignment with organizational culture, actionable methods.*

*Your answer:*

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- How important are team qualifications and references?

*Your answer:*

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- How will budget and perceived value factor into the decision?

*Your answer:*

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## 6. Ask Targeted Questions

**Context:** Craft questions to encourage detailed, thoughtful responses that go beyond generic templates.

**Worksheet:**

- What key questions will you ask to assess their expertise?  
*Example: How will you align leadership around a unified vision? How do you ensure plans are actionable?*

*Your answer:*

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## 7. Establish a Realistic Timeline

**Context:** Provide a clear schedule for the RFP process and project execution.

**Worksheet:**

- When will the RFP be released, and when are proposals due?

*Your answer:*

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- What is your anticipated start and end date for the project?

*Your answer:*

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- Are there specific milestones or deadlines to consider?

*Your answer:*

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## 8. Clarify Budget Expectations

**Context:** If possible, provide a range or maximum budget to help respondents tailor their proposals.

**Worksheet:**

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## 9. Request Samples and References

**Context:** Ask for relevant case studies and references to gauge the quality of their past work.

**Worksheet:**

- What specific types of work samples will you request?  
*Example: A past strategic plan, an implementation roadmap.*

*Your answer:*

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- What types of references will you prioritize?  
*Example: Clients with similar needs or industries.*

*Your answer:*

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## 10. Encourage Dialogue and Alignment

**Context:** Create opportunities for consultants to ask questions and demonstrate alignment with your organizational values.

### Worksheet:

- Will you host a Q&A session? If so, when?  
*Your answer:*

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- What aspects of organizational culture and values will you emphasize?  
*Your answer:*

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By completing this workbook, you'll have a structured and detailed foundation for your RFP. This intentional approach will help you attract tailored, high-quality responses and set the stage for a successful strategic planning partnership