

# RFP EVALUATION

## BEST PRACTICES ←

A large retirement advisory firm recently engaged WinMore Plans in an 8-week project to review their written RFP response and interview the sales team. Recommendations were delivered quickly and set into a prioritization grid so the firm could make the most impactful changes first.



## DELIVERABLES ←

Our approach includes a final report with actionable recommendations, proof statements, and an RFP Library that your team can use to build on and improve future responses.

## RFP PRIORITIES ←

Written Tone / Voice



Document Navigation




Team and Experience



Services



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## In our experience...

**3 Things**  
plan sponsors  
want to see



### I like you

Your team is passionate about the work they do. Our evaluation includes interviews to pinpoint what your team cares about and what they think prospects should know about your firm. We weave your business and team personality into your RFP so plan sponsors get to know you before you ever meet.

### I trust you

Plan sponsors tell us they want partners who work as an extension of their team. Our detailed recommendations and proof statements will help you bring value and quantify your experiences to help the reader understand and trust your practice.

### I want what you deliver

Your first opportunity to impress a prospective client is in your RFP. We assess your recent bids and help develop your voice to enhance your firm's service offerings. We create consistent RFP navigation to demonstrate you are easy to work with! Our thoughtful recommendations will help you differentiate your business and win more.

→ *"This is just what we were looking for to get an edge! We are already incorporating these ideas into our current RFP responses." – Jamie, Client*