



# Improvement of RFP process

Assistance to enhance your *hit ratio*

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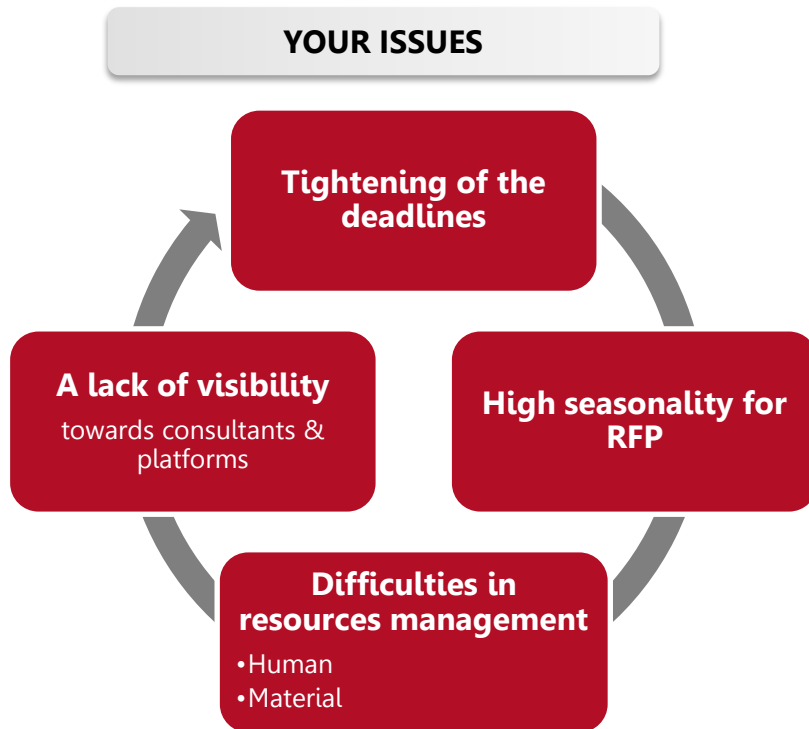


# Improvement of RFP process

Challenge: Be more efficient in RFP management

**CONTEXT**

- Increase of RFPs from institutional investors : in volume and amount
- Stronger intermediation of the activity which becomes more and more professional:
  - ▶ Investment consultants
  - ▶ Platforms



**KEY ASPECTS**

- 1. Data management**
  - ▶ Set-up content libraries
  - ▶ Organise update processes
  - ▶ Rally contributors
- 2. Activity steering**
  - ▶ Determine KPI
  - ▶ Optimise existing processes
  - ▶ Communicate on performance
- 3. Position of the RFP activity**
  - ▶ Clarify RFP officers' role with consultants & databases and with sales (internally)
  - ▶ Define strategy and uses for platforms

**Périclès is helping you to be more efficient as regard of your RFP activity**

- ▶ Optimised processes, a quicker and easy management of RFP to allow the team focus on value-added tasks

# Improvement of RFP process

Our approach: A customised support at every step



## Organisation diagnosis

- Review of the organisation and existing operational processes
  - ▶ Interviews with identified people
  - ▶ Documents collection
- Mapping of issues and improvement ideas
- Gathering of stakeholders' expectations as regard of the activity:
  - ▶ RFP Officers
  - ▶ Top Management
  - ▶ Operations managers
  - ▶ Contributors
- Overview of the current situation
  - ▶ Activity mapping
  - ▶ SIPOC
  - ▶ Logigram
  - ▶ ...



## Gap Analysis

- Comparison with activity state-of-the-art on the European Market
  - ▶ Best practices
  - ▶ Trends status
- Evaluation of institutional investors and consultants expectations'
  - ▶ Périclès market review
  - ▶ Interviews
  - ▶ Post-mortems
- Gap analysis between current situation and state-of-the-art:
  - ▶ Position of the activity in the market
  - ▶ Contrast organisation specificities with the state-of-the-art
  - ▶ Integration of clients' perception



## Actions plan

- Description of areas of improvement
- Presentation of recommendations and of an actions plans:
  - ▶ Data Management and RFP repository
  - ▶ Definition of indicators
  - ▶ Activity steering
  - ▶ Team visibility
  - ▶ ....
- Proposition of a support and follow-up plan
  - ▶ Organisation of the execution
  - ▶ Workstreams management
  - ▶ Actions follow-up
  - ▶ Project steering

## Improvement of RFP process

### Our strenghts and inputs

- ▶ **A global vision of the RFP position and of major issues related to its business**
- ▶ **A strong experience of RFP processes** acquired during many missions of RFP intermediation on behalf of institutional investors
- ▶ **The understanding of Asset Owners needs'**: with more than 300 missions realised since Group creation for insurers or mutual insurance companies, we have privileged relationships with many institutional investors and a sharp vision of their concerns
- ▶ **Our knowledge of Best Practices**: with our study conducted with RFP teams of European asset managers (June 2016), we have a clear vision of the state-of-the-art and of RFP officers' feelings. The phase 2, focused on asset owners is in progress
- ▶ **Our proven project management methodology** on activities' organisation, processes' optimisation or new services' implementation