Turning RFPs Into Strategic Dialogues

Idea In Short

When a request for proposal [RFP] arrives on a supplier's desk with the requirements already frozen, the outcome is nearly written: comparison against a scorecard, negotiation on price and a contract awarded to whoever files the lowest number. The recommendation for commercial leaders is straightforward: the real deal shaping happens before the document is issued, not after. Sales and account teams that engage stakeholders during requirements definition, surface unstated priorities and help the buying committee articulate what genuinely differentiates one supplier from another change the competitive frame entirely. Once the RFP is published, the buyer has already decided what matters; the supplier's only remaining lever is price. Winning commercial organizations treat the weeks before an RFP drops as the highest-leverage period in the entire deal cycle, not as dead time to be filled with cold outreach.

Procurement teams did not invent the price shoot-out; buyers built it as a defense mechanism against suppliers who show up late, pitch generic capabilities and expect the buyer to do the work of translating features into value. The irony is that the same mechanism now traps suppliers who have genuine differentiation, because a request for proposal issued with fixed requirements and a weighted scorecard leaves little room to argue for anything beyond the lowest compliant bid. Commercial leaders who want to escape that trap have to accept an uncomfortable premise:

> by the time the RFP lands in the inbox, most of the deal has already been decided and the supplier's job is no longer to sell but to comply

Why RFPs default to price competition

A formal RFP exists to create comparability and comparability requires standardization.

Once a buying committee writes down a fixed set of requirements, weights them and distributes the document to multiple bidders, every response gets measured against the same yardstick, which flattens differentiation almost by design. Gartner's research on B2B sales notes that organizations focused on combating commoditization need to elevate the value of sales interactions well before the transactional stage of a deal, not during it.1 Once a document is public, suppliers face identical questions, identical deadlines and evaluators trained to score against a rubric rather than debate merit. Any supplier still trying to differentiate at that stage is negotiating on terms someone else already wrote and the terms almost always favor whichever bidder can absorb the lowest margin.

Consider a mid-market industrial equipment buyer preparing to replace an aging maintenance management system. If the procurement function drafts requirements internally, using a generic template pulled from a previous purchase, the resulting RFP will likely ask for feature checklists and per-seat pricing, because that is what the template rewards. A supplier with a genuinely superior implementation methodology, deeper integration capability, or a track record of faster time to value has no field on the scorecard to claim that advantage. The requirements document, not the supplier's pitch, determines what counts as a win.

Reading the buying signals before the document exists

Every RFP has a gestation period and it is rarely short. Forrester's research on B2B buying groups shows that younger buyers, who now make up the majority of purchasing committees, want providers to co-create solutions with them well before a formal evaluation begins and they are considerably more likely to choose a vendor that invested in that collaboration.2 That preference creates an opening for suppliers willing to do the work of understanding a prospect's operating environment before a document exists. Signals worth tracking include new executive hires with mandates to modernize a function, budget cycles that create a natural window for capital requests, regulatory changes that force a category review and public statements from the buyer about strategic priorities.

Account teams that treat these signals as triggers for a structured conversation, rather than as generic prospecting cues, build the kind of context that lets them ask sharper questions once a real dialogue opens. The goal at this stage is not to pitch a solution; it is to understand the buyer's constraints well enough to help them define the problem accurately. Suppliers who skip this step and wait for an RFP to appear on a portal are, by definition,

entering the process after the requirements have already been shaped by someone else, often a competitor who got there first.

Structuring dialogue during the shaping window

Once a buying committee begins forming, there is usually a window, sometimes measured in weeks and sometimes in quarters, during which requirements are still fluid. This is the highest-leverage period in the entire deal cycle and it rewards structure over improvisation. A useful discipline is to map the buying committee by function rather than by title: who owns the budget and the business case, who will operate the solution daily, who carries technical or security risk and who has historically blocked similar purchases. Each of these roles cares about different evidence and a supplier who addresses only the economic buyer will miss the technical and operational stakeholders who often control the requirements language.

Bain's research on procurement's expanding mandate found that CPOs are now expected to deliver value across cost, sustainability, supplier diversity and risk resilience simultaneously, which means the buying committee's priorities are rarely reducible to price alone even when the eventual RFP looks like a price exercise.3 Suppliers who understand that broader mandate can shape conversations around total value rather than unit cost and can help stakeholders articulate criteria that a generic RFP template would otherwise omit. This is also the stage at which a named executive sponsor from the supplier side, engaging peer to peer with the buyer's leadership, tends to matter more than any amount of account-team activity further down the organization.

Writing requirements that reward differentiation

The single highest-leverage intervention available to a supplier is influencing how the eventual requirements document gets written, without ever touching the document itself. This happens through the questions asked during discovery conversations. A supplier who asks a buyer to quantify the cost of downtime, describe what "successful implementation" looks like in specific terms, or explain how the current process fails under peak load is effectively feeding language into the requirements the buyer will later draft. Procurement functions that consolidate demand and standardize bidding, as McKinsey's work on large-scale procurement transformations shows, gain real efficiency, but that same consolidation can push evaluation toward landed cost and away from differentiated capability unless

business stakeholders insert outcome-based criteria first.4

Illustrative scenario: a regional healthcare network preparing to modernize its patient scheduling platform spends several months talking with three potential suppliers before drafting its RFP. One supplier consistently asks about no-show rates, staff overtime tied to manual rescheduling and the clinical impact of delayed appointments, rather than leading with product features. By the time the network's procurement team drafts requirements, several of those outcome measures appear as evaluation criteria, not because the supplier wrote the document, but because the supplier's questions shaped how the buying committee thought about the problem. The other two suppliers, who focused their conversations on product demonstrations, find the resulting RFP graded almost entirely on price and technical checklist compliance.

> To successfully balance AI efficiency with the growing demand for human interaction, organizations should implement a hybrid sales model that leverages the strengths of both

That observation from Gartner's Elizabeth Jones, made in the context of B2B sales technology, applies just as directly to RFP strategy:

> automation and self-service tools can handle information gathering, but the requirements-shaping conversation still depends on a human seller asking better questions earlier than anyone else in the field

Handling procurement without surrendering the conversation

None of this argues for bypassing procurement and attempts to do so usually backfire once procurement discovers a supplier has been working the business side without disclosure. Procurement exists to protect the organization from favoritism, unverified claims and negotiating leverage lost to premature commitment and those are legitimate functions. Deloitte's most recent global survey of chief procurement officers found supplier

collaboration to be the most frequently cited procurement strategy among CPOs worldwide, ahead of pure cost reduction, which suggests procurement leaders themselves increasingly see early supplier engagement as compatible with, not opposed to, disciplined sourcing.5

The practical approach is transparency rather than avoidance. Suppliers should tell procurement directly that they have been engaging business stakeholders on requirements definition, offer to share what they have learned with the sourcing team and ask how procurement wants that input incorporated into the formal process. Some procurement functions welcome a structured request for information ahead of the RFP; others prefer a vendor day or an industry briefing that reaches every potential bidder at once. Either format still gives an engaged supplier an advantage, because the supplier walks in with a head start on understanding the buyer's language and priorities, even when every competitor gets equal access to the same forum.

Measuring dialogue quality, not just win rate

Commercial organizations that adopt a pre-RFP engagement discipline need metrics that capture the behavior, not just the outcome, because win rate alone arrives too late to correct course. Harvard Business Review's research on prescriptive selling found that suppliers who actively guide customers through each stage of a purchase decision, rather than waiting to respond once requirements are fixed, consistently outperform those who treat the RFP as the start of the relationship.6 Three measures matter most. First, track how often requirements language in an issued RFP mirrors terminology and priorities raised in earlier discovery conversations, which indicates the dialogue actually shaped the document. Second, track the proportion of deals where the account team engaged with at least two stakeholder functions more than ninety days before issuance, since single-threaded relationships collapse the moment a buying committee expands. Third, track how proposals differ when written after substantial pre-RFP engagement versus cold responses, looking specifically at whether the proposal spends less space explaining capabilities and more space quantifying outcomes the buyer already confirmed matter to them.

None of these measures replace win rate as the ultimate scoreboard, but they diagnose why win rate moves. A sales organization that only tracks wins and losses on published RFPs is measuring the result of a game that was mostly decided months earlier, during a period the organization never systematically managed. Building the discipline to manage that earlier period, treating it with the same rigor applied to proposal writing and pricing approval, is

what separates commercial teams that consistently escape price-only competition from those that keep discovering, too late, that the requirements were written by someone else.

- 1Gartner Says By 2030 That 75% Of B2B Buyers Will Prefer Sales Experiences That Prioritize Human Interaction Over AI
- 2Younger Generations Are Shaking Up B2B Buying — Are You Prepared
- 3Procurement's Evolving Mandate: Value Beyond Savings
- 4Big Procurement Footprint? Better Bidding Yields Bigger Savings
- 5Procurement At The Tipping Point: Deloitte's 2025 Chief Procurement Officer Survey
- 6The New Sales Imperative

Summary

Turning a request for proposal into a strategic dialogue is not about circumventing procurement or exploiting insider access; it is about earning a seat in the conversation early enough to shape what good looks like. Commercial teams that map buying committees before a document exists, ask better questions than competitors and translate technical requirements into business outcomes consistently avoid the price-only trap that swallows the majority of formal bids. Procurement's role in verifying value remains legitimate and disciplined evaluation criteria protect buyers from empty promises. What changes is the sequence: suppliers that show up with insight before the RFP shape the requirements that later define the scorecard. Those that wait for the document to land are negotiating on terms someone else wrote. The advantage belongs to whoever treats pre-RFP engagement as a discipline rather than an afterthought.