

# Winning RFPs: A Strategic Guide for Selling Season Success

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Halloween is over, which means next up is turkey trots, stuffing, or if you're like me, Christmas décor coming out of the attic...and selling season is right around the corner! Request for Proposal (RFP) volume is reaching record highs with both prospects and renewals. Managing even a single RFP can be complex, with many moving parts and cross-functional coordination. During peak season, having a clear strategy is essential.

Use the checklist below as a best practice guide for showcasing your Plan's value and advancing to the finalist meeting.

## Prospecting Stage (12-18 months out, at a minimum)

### • Identify the Prospect and their pain points

- Create a pipeline of Prospects based on your current clients → If you have medical but not pharmacy lives, add the pharmacy business to your pipeline and begin prospecting early to win when pharmacy is out to bid Identify dissatisfaction with their current carrier or service gaps.
  - Clearly outline your solutions, supported by case study examples and projected savings.

### • Develop consultant relationships

- Consultants are the most available to engage with you and learn the differentiated value you bring to clients outside of RFP busy season → Collect, store, and socialize consultant feedback within your organization
- Be their trusted advisor → Provide market insights and demonstrate how your Plan addresses current challenges Educate on new solutions and pricing strategies:
  - Introduce new products and solutions during the off-season to ensure the consultants are well-educated in why this is a differentiator **before** the RFP drops.
  - Provide value, adoption metrics, and a simple implementation plan → If the consultants know the value-add in implementing these programs, they will promote to their clients
  - Provide pricing insights → Are there changes you are making to your pricing model, terms & conditions, rebates and trends?
- Continue to evolve and innovate: Refresh on your existing solutions and their differentiating features → Equip consultants to be in the best position to understand and promote your offerings.

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## Pre-RFP stage (6-10 months out)

- **Create an RFP content database** to reference including language detailing your program offerings. Be sure to validate and update with subject matter experts annually. Assets to include:
  - Case studies with proof points
  - Messaging on the value of integration
- **Consultant Templates:** Request RFIs from consultants where you want to build a growth strategy and create a response template for your content database. Pre-populating responses to the standard questions ahead of time will allow more time to focus on strategic questions.
  - Create consultant-based subject matter expert groups who can provide the latest insight on preferences of those consultants. This group should include an owner of the consultant relationship, Sales, Account Management, Clinical, Underwriting, Proposals, and Reporting partners.
  - Consulting Fees: Are fees being underwritten into deals? Assess the financial value your consultant partnerships provide.

## RFP Stage

- Begin with a kick-off call including Sales and cross-functional partners to align on winning strategy. You should walk away from the kick-off call able to answer the following questions:
  - How will your plan address their pain points?
  - Why you? Why are you the best fit?
  - Identify clarifying questions early
  - Alignment on internal timelines to complete the RFP on time



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- **DID** you answer the question? We suggest structuring responses with the following considerations in mind:
  - **Dollars:** Savings, ROI - Start with the financial value implementing this program will bring.
  - **Innovation:** What is the path forward? What will partnership look like in the future?
  - **Details:** Ensure you are answering all parts of the question and responses include key details to the program or solution.
- **Mitigating deviations:** It is key to get to as many "Yes" responses as possible rather than declining or deviating. On areas where you currently are responding no based on current capabilities - how can you operationalize and get to yes?
  - **Example:** RFP is requesting a report and you do not currently have that report set up. Can you agree now and build out the report before the client goes live?

As we dive into the heart of selling season, **preparation and strategic alignment** are your greatest assets. By proactively engaging consultants, refining your messaging, and leveraging proven best practices, you position your Plan to stand out in a competitive market. The RFP process may be complex, but with a clear roadmap and collaborative execution, you can confidently showcase your value and drive toward finalist meetings—and ultimately win! **Don't hesitate to reach out to your Health Plan Growth Proposals manager to collaborate on strategic opportunities. Let's make this season count!**

