



**Request for Proposal (RFP)
Professional Certification Market Assessment Research**

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August 30, 2013

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1. Summary and Background

The Legal Marketing Association (LMA) is the universal voice of the legal marketing and business development profession, a forum that brings together CMOs and entry-level specialists from firms of all sizes, consultants and vendors, lawyers, marketers from other professions, and marketing students to share their collective knowledge.

LMA boasts more than 3,200 members in 48 U.S. states, Canada and 15 other countries and 19 chapters across North America. Ninety-three (93%) percent of the 250 largest U.S. law firms employ an LMA member.

Since 1985, the Legal Marketing Association has been the voice of legal marketing professionals and attorneys looking to develop their practices. The association addresses the demanding needs of its members by providing:

- Continuing educational and professional development opportunities.
- Forums for open exchange of ideas and knowledge.
- Establishment of professional ethics and standards of conduct and performance.
- Education to the legal community as well as other professionals about the important role law firm marketing and business development play within the industry.

LMA is interested in exploring the perceived value and need for a professional certification program among members and non-members in the field. LMA intends to conduct focus group research with key stakeholders to gauge participants' thoughts and reactions related to a certification program, and determine the level of support that may exist for this program by professionals who would be in a position to make hiring decisions for legal marketers. This feedback will be used to develop recommendations about whether to pursue certification and what elements are essential to its success in the marketplace.

With this RFP, LMA is soliciting proposals from several market research firms capable of assisting with the focus group research with non-member audiences. The proposals will be evaluated by LMA Headquarters Staff and volunteer leaders. Following review of all proposals, LMA will select the firm that most closely aligns with project and initiative objectives.

2. Proposal Guidelines

Proposals will be accepted until 5:00 p.m. September 17, 2013. Any proposals received after this date and time will be returned to the sender. All proposals must be signed by an official agent or representative of the company submitting the proposal.

If the organization submitting a proposal must outsource or contract any work to meet the requirements contained herein, this must be clearly stated in the proposal. Additionally, all costs included in proposals must be all-inclusive to include any outsourced or contracted work. Any proposals which call for outsourcing or contracting work must include a name and description of the organizations being contracted.

All costs must be itemized to include an explanation of all fees and costs.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP. All contractual terms and conditions will be subject to review by LMA's Headquarters Staff and will include scope, budget, schedule and other necessary items pertaining to the project.

3. Project Purpose and Description

The purpose of this project is as follows:

LMA believes that a legal marketing certification program will serve as a signal to prospective employers and clients that an individual (or entity) possesses a certain skill set or knowledge base which makes them uniquely qualified to provide marketing-related services to a law firm.

LMA wishes to gain both validation for this assumption and a comprehensive understanding of what an optimal certification program looks like in the eyes of those most likely to assign and contribute to its value.

The findings from this effort will be used to inform recommendations to LMA leadership about the viability and key aspects of a legal marketing certification program.

Project Description:

The project includes conducting a series of focus groups with senior marketer members at law firms (hiring managers), non-member law firm leaders and administrators, and individual attorneys who influence the hiring of or directly hire marketers or marketing consultants and contractors.

LMA will draft the discussion guide and conduct the focus groups with senior marketer members, and is seeking a partner to conduct focus groups with non-member law firm leaders and administrators, and individual attorneys.

The purpose of the research project is to:

- Define the value of legal marketing certification.
- Pinpoint critical components and facets of the program.
- Assess how decision-makers are currently validating qualifications and skills.
- Delineate what a market-leading certification program would look like in the eyes of law firm leaders.

A market research firm with proficiency in conducting qualitative research with business professionals is being sought to conduct the focus groups with non-member segments, and share findings based on this expertise.

4. Project Scope

The scope of this project includes identifying and recruiting focus group participants from the target audiences, scheduling and confirming meeting times with participants, adapting recruitment materials and discussion guide questions to target audiences, conducting the

focus groups via teleconference or other virtual means to achieve the goals outlined below, note-taking during focus groups to capture feedback (including verbatim quotes), and the creation of a consolidated final report summarizing findings for each group's participants.

A sample recruitment email, focus group discussion guide and suggested follow-up questions will be provided to the selected bidder by LMA's marketing department. Lists of potential focus group participants will be jointly sourced by LMA and the chosen vendor, primarily from LMA partner organizations.

Focus group participant goals and requirements are outlined below:

- Feedback from a total of 30 non-member law firm leaders and administrator participants, and 30 individual attorney participants is required.
- At least two focus groups should be hosted with each audience segment to ensure feedback is not biased by one participant. Should recruitment challenges prevent focus group discussions with groups of law leaders or individual attorneys, one-on-one calls should be conducted with members in the target audience segments until the target number of participants is achieved.

5. Request for Proposal and Project Timeline

Request for Proposal Timeline:

Proposals will be accepted until 10:00 p.m. September 17, 2013.

Evaluation of proposals will be conducted from September 18 through September 23, 2013. Follow up with the top three candidates will be conducted within this window to obtain any necessary clarification on items described within proposals.

The selection decision for the winning bidder will be made no later than September 25, 2013.

Upon notification, the contract negotiation with the winning bidder will begin immediately. Contract negotiations will be completed by October 2, 2013.

Notifications to bidders who were not selected will be completed by October 7, 2013.

Project Timeline:

Focus group invitations must be sent out by the end of the week of October 14, with groups to begin no later than the end of the week of November 8, 2013. Focus group discussions must be completed by November 22, 2013.

Final report with findings must be completed and provided to LMA by November 29, 2013.

6. Budget

All proposals must include proposed costs (in U.S. dollars) to complete the tasks described in the project scope. Costs should be stated as one-time or non-recurring costs (NRC). Pricing should be listed for each of the following items in accordance with the format below:

Project Initiation and Planning

Sample Identification
Recruitment/Scheduling of Focus Group Members
Focus Group/Participant Interview Time
Focus Group/Interview Transcription Time
Data Compilation and Analysis Time
Teleconference & Third-Party Technology Costs
Suggested Participant Incentive (if recommended)

NOTE: All costs and fees must be clearly described in each proposal.

7. Bidder Qualifications

Bidders should provide the following items as part of their proposal for consideration:

- Description of experience in planning, executing and analyzing research projects and findings
- Examples of three or more similar projects conducted by your organization
- Testimonials from past clients on research projects conducted by your organization
- Anticipated resources you will assign to this project (total number, role, title, experience)
- Confirmation of timeframe for completion of the project
- Project management methodology

8. Proposal Evaluation Criteria

LMA will evaluate all proposals based on the following criteria. To ensure consideration for this project, your proposal should be complete and include all of the following criteria:

- Overall proposal suitability: proposed solution(s) must meet the scope and needs included herein and be presented in a clear and organized manner
- Organizational Experience: Bidders will be evaluated on their experience as it pertains to the scope of this project
- Previous work: Bidders will be evaluated on examples of their work pertaining to market research projects as well as client testimonials and references
- Value and cost: Bidders will be evaluated on the cost of their solution(s) based on the work to be performed in accordance with the scope of this project
- Technical expertise and experience: Bidders must provide descriptions and documentation of staff technical expertise and experience

Each bidder must submit a digital copy of their proposal via email to the address below by 10:00 p.m. September 17, 2013.

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