



Request for Proposal (RFP) Member Benefits Research

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1. OVERVIEW 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 has eight regions across the U.S. and Canada, and its more than 4,000 members hail from 48 U.S. states and 23 countries. More than 90 percent of the largest 200 U.S. law firms employ an LMA member.

Since 1985, the Legal Marketing Association has been the voice of legal marketing professionals and members at every stage in their career development benefit from participating in LMA's array of programs and services. 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

2. PROJECT SUMMARY

LMA intends to conduct research among members to gauge their thoughts, preferences and perceived value of LMA membership and the events, programs and services that LMA offers. This feedback will be used to develop recommendations to augment LMA's product and service portfolio, prioritize resource allocation and effectively communicate the value of LMA programs and services.

With this RFP, LMA is soliciting proposals from market research firms capable of conducting primary research to meet the project's goals through a hybrid of quantitative and qualitative research. LMA headquarters staff and volunteer leaders will evaluate the proposals.

Following review of all proposals, LMA will select the firm that brings appropriate expertise, most closely aligns with project objectives and articulates a clear, achievable research plan to meet those objectives within the required timeframe.

3. PROPOSAL GUIDELINES

Proposals will be accepted until 10:00 p.m. CT on Wednesday, November 29, 2017. 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.

Proposals should not be more than 10 pages in length.

If the organization submitting a proposal must outsource or contract any work to meet the requirements, this must be clearly stated in the proposal. Additionally, costs included in proposals must include any outsourced or contracted work. Any outsourcing or contracting organization must be named and described in the proposal.



Please itemize all costs and include a description of associated services.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP.

4. PROJECT PURPOSE AND DESCRIPTION

The purpose of this project is as follows:

LMA would like to gather feedback from members regarding its programs and services in order to inform investment and communications decisions. We would like to understand the perceived value of existing programs and LMA membership overall. Additionally, we anticipate gaining a better understanding of opportunities to enhance perceived value of LMA membership.

The results of the member benefits research will be used to continue to prioritize resource allocation, inform current and new initiatives and effectively communicate the value of LMA programs and services, including overall LMA membership.

Project Description:

The chosen partner will create, field and analyze an online survey – in conjunction with LMA staff and a small group of volunteers – and facilitate qualitative research in the form of telephone focus groups.

The chosen partner will develop the online survey questions based on industry best practices and input from LMA staff and the small group of volunteers. The focus group questions will be developed based on findings from the online survey in order to gather more nuanced and qualitative information about select current programs and services, and to identify new benefit opportunities.

The purpose of the research project is to:

- Define the value of LMA's current products and services.
- Define the value of being an LMA member.
- Pinpoint critical value drivers for LMA members.
- Identify opportunities to further maximize the LMA program and service portfolio.

We are seeking a market research firm with proficiency in conducting both quantitative and qualitative research with expertise in analyzing the perceived benefit of membership programs, products and/or services to conduct an online survey and focus groups with LMA members, and synthesize results to share findings based on their expertise.

5. PROJECT SCOPE

The **quantitative scope** of this project includes creating, fielding and analyzing an online survey – in conjunction with LMA staff and a small group of volunteers. This survey should follow industry best practices, including acquiring a statistically significant sample of LMA members and key member segments. The online survey will be hosted by the chosen partner and should be crafted in a way that maximizes ease of use by the participants, including the ability for respondents to participate on a mobile device. The chosen partner will provide the following to LMA: the full raw data, cross-tabulations of key data sets and a final report, including an executive summary and recommendations. The results of the online survey will help determine questions for the subsequent focus groups.

The **qualitative 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,
- taking notes during focus groups to capture feedback (including verbatim quotes), and
- creating a consolidated final report summarizing findings for each.

LMA will assist in sending recruitment emails for both phases of the project to its internal member and past-member lists.

Focus group participant goals and requirements are outlined below:

- Feedback from 30-40 members across key audience segments is required.
- At least four focus groups should be hosted.
- Should recruitment challenges prevent focus group discussions, one-on-one calls must be conducted with members in each audience segment until the target number of participants is achieved, though this is not anticipated to be necessary. As a point of reference, previous research has generated a high level of response and engagement from LMA members.

Note: LMA is open to recommendations for alternative methodologies/approaches that achieve the project's purpose and can be accomplished within the timeline noted on page five.



6. REQUEST FOR PROPOSAL AND PROJECT TIMELINE

Proposal Timeline:

Proposals will be accepted until 10:00 p.m. CT on Wednesday, November 29, 2017.

Evaluation of proposals will be conducted from November 30 through December 8, 2017. 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 by December 8, 2017.

Upon notification, the contract negotiation with the winning bidder will begin immediately and must proceed extremely quickly to meet the project timeline.

Notifications to bidders who were not selected will be completed by December 13, 2017.

Project Timeline:

The results of the project must be finalized no later than April 6, 2018 to be presented at the April 8, 2018 LMA Board of Directors meeting. The online survey must be open for at least two full weeks.

A draft timeline is presented below. Internal changes may be made if mutually agreed; however, the presentation deadline of April 8, 2018 will not change.

Online Survey	
<i>Questions Prepared and Approved</i>	December 2017- January 2018
<i>Survey Fielded</i>	January 16 - 31, 2018
<i>Results Analyzed</i>	February 2018
<i>Survey Results Presented to LMA Board</i>	April 8, 2018
<i>Survey Results Shared with Regional Presidents</i>	April 2018

Focus Groups	
<i>Target Audiences Identified</i>	February 2018
<i>Questions Developed</i>	February 2018
<i>Focus Group Participants Recruited</i>	February 2018
<i>Focus Groups Complete</i>	by March 15, 2018
<i>Focus Group Findings Reported</i>	April 8, 2018

Unless otherwise noted, work will be completed by the end of month identified above.



7. 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
- Development of Online Survey
- Recruitment for Online Survey Participation
- Data Compilation and Analysis Time for the Online Survey
- Recruitment/Scheduling of Focus Group Members
- Focus Group/Participant Interview Time
- Focus Group/Interview Transcription Time
- Data Compilation and Analysis Time for the Focus Groups
- Teleconference and Third-Party Technology Costs
- Suggested Participant Incentive (if recommended)

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

8. BIDDER QUALIFICATIONS

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

- 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

Bidders must submit a digital copy of their proposal via email to skusibab@legalmarketing.org by 10:00 p.m. CT on Wednesday, November 29, 2017. Please include "Research RFP Response" in the subject line.