The Hidden Costs of Inefficient RFI/RFP Processes – And How to Fix Them

October 22, 2025

Webinar will begin promptly at 11:00 ET

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2025 ISMPP Academy

November 13-14
Boston, MA

Registration Ends Oct. 30!

What topics are covered?

- Publication planning
- Visual communications
- GPP, best practices, SOPs
- PLS/PLSPs
- Practical AI
- Small group activities

Who should attend?

- Biotech, Small pharma and Medical device teams
- Newer to med pubs/comms
- Team knowledge-sharers
- Anyone who wants to build their expertise!

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2026 European Meeting of ISMPP

26-28 January
London, UK

9 September

Registration, Exhibits and Sponsorships Open

16 January

Registration Closes

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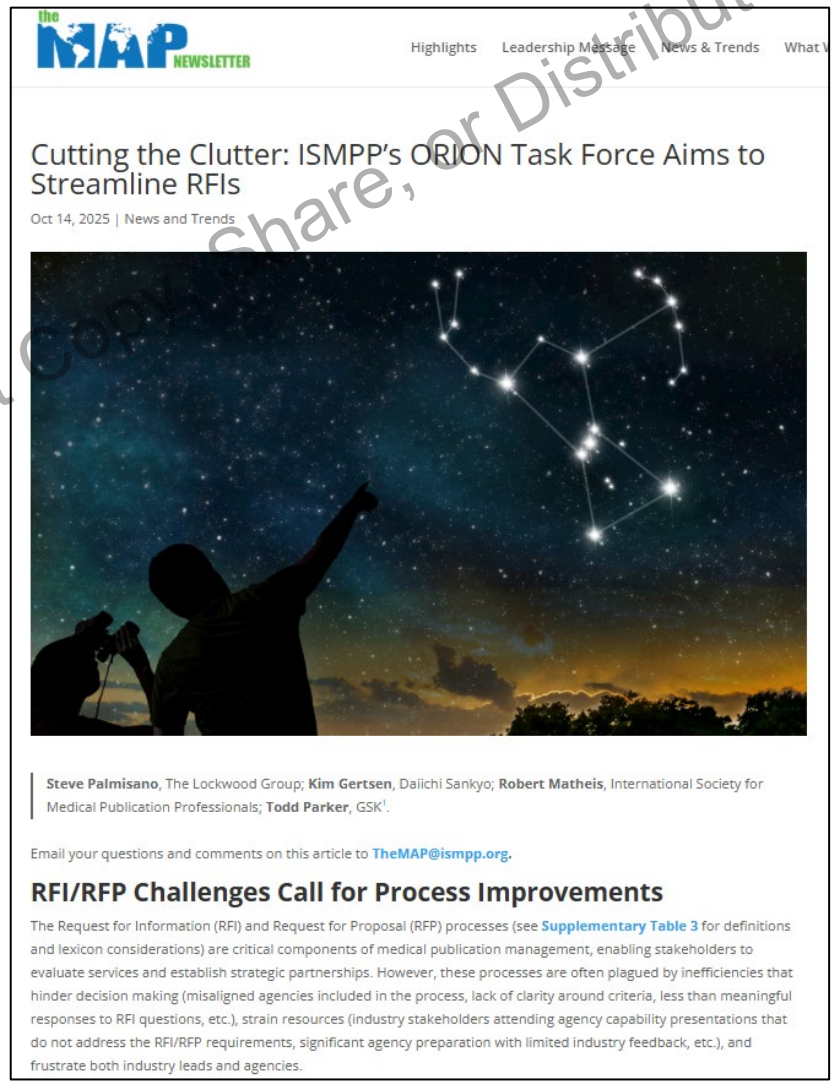
The MAP Newsletter - Publication

Cutting the Clutter: ISMPP's ORION Task Force Aims to Streamline RFIs | the Map Newsletter

October 14, 2025

The ORION Task Force

https://www.ismpp-newsletter.com/2025/10/14/orion-rfi-taskforce/



the MAP NEWSLETTER

Highlights Leadership Message News & Trends What

Cutting the Clutter: ISMPP's ORION Task Force Aims to Streamline RFIs

Oct 14, 2025 | News and Trends

Steve Palmisano, The Lockwood Group; **Kim Gertsen**, Daiichi Sankyo; **Robert Matheis**, International Society for Medical Publication Professionals; **Todd Parker**, GSK[1].

Email your questions and comments on this article to TheMAP@ismpp.org.

RFI/RFP Challenges Call for Process Improvements

The Request for Information (RFI) and Request for Proposal (RFP) processes (see Supplementary Table 3 for definitions and lexicon considerations) are critical components of medical publication management, enabling stakeholders to evaluate services and establish strategic partnerships. However, these processes are often plagued by inefficiencies that hinder decision making (misaligned agencies included in the process, lack of clarity around criteria, less than meaningful responses to RFI questions, etc.), strain resources (industry stakeholders attending agency capability presentations that do not address the RFI/RFP requirements, significant agency preparation with limited industry feedback, etc.), and frustrate both industry leads and agencies.

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Disclaimer

Information presented today
reflects the personal opinions of the faculty and
does not necessarily represent the position of
their current or past employers.

Both of today's presenters

are volunteer members of the

"ISMPP ORION Task Force on RFIs/RFPs"

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Presenters – Members of ISMPP Task Force

Industry and Agency Employment

Todd Parker
Governance and Best Practices Lead,
Global Scientific Communications
GSK

Industry and Agency Employment

Steve Palmisano
EVP, Publication Services
The Lockwood Group

When RFIs/RFPs Arrive at An Agency,

It's GREAT!

"It's different than the other publication RFI questions!"

Plan for some operational disruption, requiring reallocation of staff time and extending working hours

Any common questions from other RFIs?
Why are some questions asked?
Need to manage efficiency and increased workload for already lean teams.

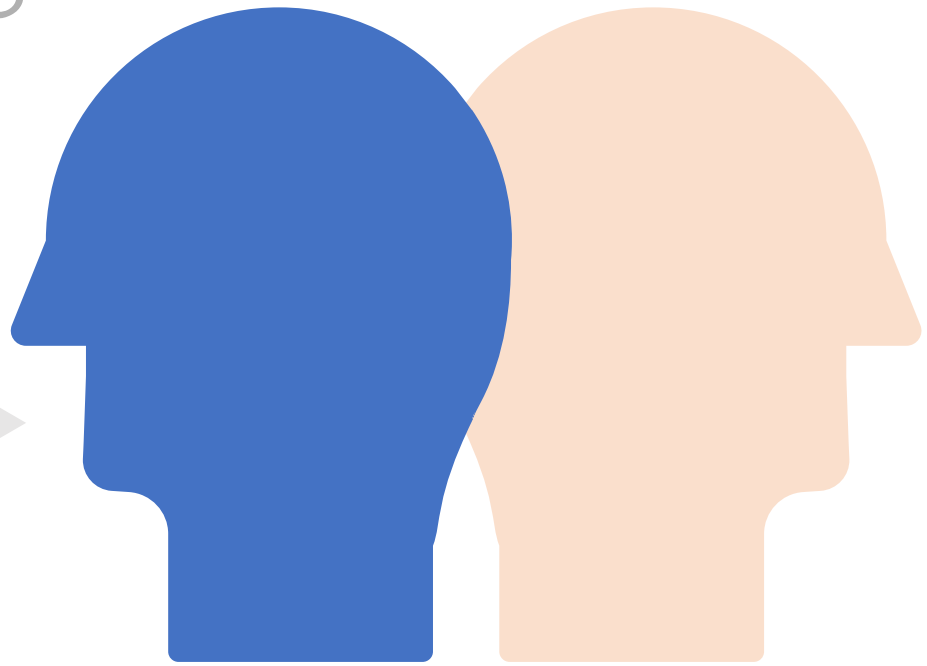
When RFIs/RFPs Are Sent by Pharma/Biotech,

Hoping for meaningful answers!

My concern: Overpromising in the answers and eventually underdelivering

I hope we get meaningful answers from the agencies to the softer questions

I'm not certain how an agency works, but I assume agencies will pour hours into response; I hope they make a strong attempt to understand the need as they answer the questions.



Session Objectives

- Describe current RFI/RFP processes and their impact on medical publication professionals
- Identify strategies to improve collaboration and alignment between industry decision-makers and agencies
- Explain the “RFI Question Bank” and “Publication Assumptions Framework” as tools to help address efficiency and transparency, and to support decision-making

Background

Requests for Information (RFI) are an early-stage process used to gather general information from potential agency partners prior to initiating a more formal procurement process (eg, Request for Proposal, or RFP)

1

RFI/RFPs remain a key pain point for industry and agency leadership, with potential room for updates that could enhance efficiency and increase value for all stakeholders involved

2

The lack of standardization and/or access to needed information when developing responses can limit the value and comparability of agency response information obtained

3

There is generally broad agreement that these processes could be improved to the end benefit of core stakeholder groups (ie, publication leads, procurement, and agencies)

4

*Standardization, must-have questions, RFI frequency, questions affecting decision-making, who is involved in shaping RFI questions.

This is NOT a new issue, rather one that few have wanted to attempt to tackle!

EMWA 2015 Article – Cooperating for the Greater Good

For the greater good…Can agency competitors cooperate to advance medical publication practices?

Karen L. Woolley[1], Sarah Feeny[2], Julia Ralston[3], Jackie Marchington[4], Steven M. Palmisano[5], Bryce McMurray[6]

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Abstract

The business of medical writing is competitive, but can it be cooperative? Is it time for agencies, which provide professional and ethical publication support to authors, to cooperate for the greater good of the medical publication profession? Formal collaborations have occurred among competitors in the biopharmaceutical and the contract research organisation sectors but rarely among competitors in the medical communications sector. In holding the inaugural Agency Executive Forum, sponsored by the International Society for Medical Publication Professionals (ISMPP), representatives of nine large international agencies met to rectify this situation. We identified a number of areas where we might cooperate, including proposing best-practices for working with freelance medical writers and for responding to procurement-driven requests for information. We are actively looking to cooperate with other groups, such as EMWA, to help ensure outputs that are valuable to the relevant stakeholders.

Keywords: Medical writing, Medical communication agency, Freelance, Compliance, Training, Procurement

Effectively, change is almost impossible without industry-wide collaboration, cooperation, and consensus.

– Simon Mainwaring (Australian social media specialist)

Any business involves buyers and sellers. In the field of medical publications, biopharmaceutical, vaccine, diagnostic, and device companies and the authors they work with need timely and high-quality publications to meet their ethical and scientific obligations. Publication professionals, working in medical communication agencies or as freelancers, can help companies and authors meet these obligations, ethically and effectively.

We are used to thinking of medical communication agencies operating in a competitive marketplace; indeed, intense competition has influenced the success of each agency and will continue to do so. Has the time come, however, for us to expand our perspective and see agencies as being able to operate in a *collaborative* marketplace? Could focussed cooperation add to the success not just of a few agencies but also of the agency sector and the authors and clients we work for? If agency competitors were to cooperate, where would they start and what would they do?

In this article, we describe the rationale for one starting point in this discussion, the first Agency Executive Forum. We highlight business-focused initiatives identified at the Forum that are now being considered by agency ~~competitors~~ collaborators. One initiative, the 'best practices between clients and freelancers' checklist, may be of particular interest to many of the freelance members of EMWA and the American Medical Writers Association (AMWA). Through this publication, we hope to raise awareness of the Forum and the resulting initiatives. As participants at the Forum we welcome the opportunity to cooperate with EMWA members in the months ahead.

- Representatives of 9 agencies met
- Proposing best-practices for working with freelance medical writers **and for responding to procurement-driven requests for information (RFIs)**
- Issues that **could potentially expose agencies to** risk or **inefficiency** and how, through cooperative efforts, we might be able to address these issues

ISSN: 2047-4806 (Print) 2047-4814 (Online) For the greater good

Let's be provocative just for a moment...

Maybe the RFI/RFP process is inefficient because inefficiency serves a purpose

The current process protects companies from risk, spreads responsibility across many hands & disciplines, is consistent with prior RFIs, and maintains the very likely true impression of addressing fairness

Tackling change in the RFI/RFP process requires collective will, cross-functional leadership, shared standards, and breaking new ground—things that are hard to align on

The Persistent Inefficiency of RFIs and RFPs

Less about a Lack of Awareness and More About Systemic Barriers

Here are some reasons why this is so hard to materially improve:

Cultural Reticence

Acknowledging inefficiencies requires vulnerability and collaboration

The status quo may feel safer than risking bias, favoritism, or admitting potential flaws

Risk of Change

Streamlining processes can be perceived as cutting corners

Even wasteful systems are tolerated because they feel "safe" and defensible

Divergent Incentives

Pharma seeks extensive data; agencies seek relevance

Misaligned goals lead to overcomplicated and inefficient processes

Fragmentation of Stakeholders

Everyone contributes, but no one owns the process

Without a clear driver, reform stalls in complexity

Lack of Standards

There's no shared playbook for RFIs and RFPs

Each company reinvents the wheel, making inefficiency feel normal

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Why Inefficiency Persists – It's Tolerated

Agency

"Cost of doing business"

Pharma

"It's our standard RFI process"

So, What Happens?!

GRIDLOCK

So, how do we begin to tackle this!

- Small steps!
- Create safe forums!
- Transparent actions!
- Explore unique RFI/RFP ideas.
- Identify cross-functional champions.

ISMPP “ORION Task Force” Launched in 2024

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ISMPP RFI/RFP Task Force (ORION)

Rob Matheis
President and CEO
ISMPP

Steve Palmisano
EVP, Publication Services
The Lockwood Group

Andrea Shultz
EVP, Strategic Services
The Lockwood Group

Kristen Mack
Head, Publications, Communications,
and Medical Platforms
Biogen

Todd Parker
SVP, Managing Director
MedThink SciCom

Kimberly Gertsen
Director, Global Medical Affairs,
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Daiichi Sankyo, Inc

Guz Manz
Associate Director,
Strategic Sourcing
Daiichi Sankyo, Inc

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ORION

Objectives for the ISMPP ORION Initiative

To address a longstanding high-priority topic of interest

To assess current practices and identify the main challenges, inefficiencies, and potential areas for improvement

To establish templates/ formats/processes (from industry and 3rd parties) that are value enhancing for all parties

To investigate the potential benefits and drawbacks of standardizing key elements

ORION Task Force Mission

To enhance the efficiency, value, and comparability of information exchanged in proposals. By developing and promoting standardized practices, we aim to streamline the process, ensure the collection of actionable and insightful data, and foster greater consistency and clarity in responses. Our goal is to empower industry and agency leadership with reliable frameworks that facilitate informed decision-making.

Insight Generation

ISMPP Academy 2024 Insights/Learnings

Pharma colleagues noted that some agencies participating in the RFI/RFP process lately are "new to med comms" and don't know what questions to ask of pharma/biotech in return as a part of this process

For RFIs, a question bank is more useful than a confined list of questions, allowing companies to select the most important questions aligned with the specific needs

Affiliate language is preferred in MSAs (allows easier access to sister agencies that may have more relevant experience for specific project types), but the “group of agencies” landscape is perceived as being incredibly confusing lately

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Feedback received through 2024 ISMPP Academy Executive Forum, including industry, agency, and publishers.

ISMPP AM 2025 Roundtable Insights/Learnings

Standardize Expectations

- Standardized set of base questions would enhance efficiency and quality
- Common "application" for agencies

Transparency

- Open process with clear criteria (eg, number of agencies invited, key criteria)
- Clarity on budget to be awarded
- Actionable post-decision insights (ie, guaranteed feedback post-decision)

Value-driven Partnerships

- Prioritize quality over cost
- Realistic timelines that allow for enhanced outputs

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Insights received during an ISMPP 2025 Annual Meeting roundtable session.

Agency Engagement Question Bank
(OR RFI Intelligence Library)

Goal for Agency Engagement "Question Bank"

To develop a comprehensive and adaptable bank of thoughtfully crafted RFI questions that enable industry operations teams to efficiently gather targeted insights from agency partners, while streamlining the preparation process for both parties and fostering meaningful collaboration

Note: This concept of a bank of questions arose through the 2024 ISMPP Academy Executive Forum, consisting of industry and agency leaders.

ISMPP Roundtable Insights/Learnings (cont)

- Roundtable attendees reviewed common RFI/RFP topics and determined which could be answered with standardized responses versus those requiring/benefiting from tailored responses

Standardizable

- Company overview
- Agency turnover
- Corporate policies
- Quality control
- Diverse supplier
- Staff locations
- Financial stability

Customized

- Innovative offerings
- Team structure
- Project costs
- Project timelines
- Expertise
- Service offerings

Insights received during an ISMPP 2025 Annual Meeting roundtable session.

Weighing Opportunities Versus Concerns of a Standardized Set of Questions

Efficiency vs Differentiation

- Streamlined process with less repetitive data entry, saves time for agencies and pharma
- Harder for agencies to stand out; commoditizes agencies

Comparability vs Nuance

- Easier to compare apples to apples, more consistent data for pharma decision-making
- May not capture unique strengths or new ideas

Clarity vs Relevance

- Clear expectations, consistent information
- Questions might not apply to all agencies/ therapeutic areas

Fairness vs "Check the Box" Mentality

- More equitable assessment for agencies
- Focus on compliance over true understanding

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Insights received during an ISMPP 2025 Annual Meeting roundtable session.

Comprehensive Agency Engagement "Question Bank"

Key Publication RFI Questions
Operations
How do you maintain client confidentiality (eg, client name, information, obtained data) and data security?
How would your company manage a privacy breach if one should occur?
Do you have a disaster recovery plan in place? If yes, describe.
Does your company have dedicated resources for compliance and oversight? If so, please
Provide an overview of your operation's quality assurance program.
Please describe how your company would address problems with established KPIs (ie, short/long term corrective plans, quarterly business reviews to review performance and compliance, third party audits, etc)
Please describe your company's process to handle and implement corrective actions for escalations.
Core service offerings (potential RFP questions)
Please provide information on your company's mission and vision / philosophy
Please provide a brief description of your company's products and/or services, and core competencies.
Please describe your business model
What is your company's greatest competitive advantage?
Provide an overview of agency expertise: capabilities

- Versatile library of RFI questions that enables industry teams to select questions aligned with specific needs
- Organized into categories like company overview, operations, core services, and team structure/training
- Enhances efficiency in information gathering and decision-making processes
- Includes industry, procurement, and agency perspectives on each question's value in decision-making

https://ismpp.memberclicks.net/orion?servId=10046

Question Bank – Examples of Stakeholder Value

Industry, procurement, and agency perspectives vary on each question's value in decision-making, a true...

VALUE ASYMMETRY?

Is there a signal here?

	Key Publication RFI Questions	Perceived value from pub lead perpsective	Perceived value from procurement perspective	Perceived value from agency perspective
27	**Operations**			
28	How do you maintain client confidentiality (eg, client name, information, obtained data) and data security?	Medium	High	High
29	How would your company manage a privacy breach if one should occur?	Medium	High	Low
30	Do you have a disaster recovery plan in place? If yes, describe.	Low	High	Low
31	Does your company have dedicated resources for compliance and oversight? If so, please	Medium	Medium	Medium
32	Provide an overview of your operation's quality assurance program.	Medium	High	Medium
33	Please describe how your company would address problems with established KPIs (ie, short/long term corrective plans, quarterly business reviews to review performance and compliance, third party audits, etc)	Medium	High	Medium
34	Please describe your company's process to handle and implement corrective actions for escalations.	Medium	High	Medium
35	Provide a brief description of your compliance with health and safety laws and regulations (be prepared to send a copy of your policy upon request)	Medium	Medium	Low

Terminology to Consider

Lexicon considerations	Rationale
Partner vs vendor or supplier	Partner implies collaboration and shared goals; vendor or supplier suggests transactional engagement or a commodity-based service
Sustainable relationship vs one-off project	Encourages continuity and mutual investment
Engagement vs contract	Engagement suggests active collaboration; contract is more legalistic/transactional
Feedback loop vs review cycle	Implies iterative improvement vs. static evaluation
Value delivery vs cost-efficiency	Focuses on outcomes and impact, not just price
Performance metrics vs KPIs	Metrics can be broader and more strategic than narrowly defined KPIs
Ways of working (WoW) vs process documentation	WoW implies a living, evolving framework
Onboarding vs kick-off	Onboarding suggests a more thoughtful integration process

Publication Assumptions Framework

Goals of Publication Projects Assumptions Framework

To create a set of baseline assumptions for common publication project types (eg, abstracts, posters, presentations, manuscripts), enabling greater clarity, consistency, and alignment in cost estimation and comparison across organizations, while reducing ambiguity and the need for follow up

Note: This concept of a consistent baseline set of project assumptions arose through the 2024 ISMPP Academy Executive Forum, consisting of industry and agency leaders.

Goals of Publication Assumptions Framework

Suggested baseline assumptions	
• Pub Lead is responsible for providing complete data package to the agency partner • Timeline from kickoff (following disposition notification) to print production of 5-12 weeks • Agency responsible for review of congress guidelines, disclosures, and other compliance and congress-specific paperwork (e.g., author forms such as COI) • Agency responsible for author outreach for approvals • Agency responsible for ICMJE documentation, including use of publication-tracking platforms • Agency responsible for developing full poster first draft, including up to 5 individual graphs, figures, or tables (composited figures are counted individually) • Agency responsible for data verification / fact checking and poster layout • NOTE: other poster projects (e.g., a poster draft provided to agency to lay out, graphics and administrative support only, encore poster) would have differing assumptions • 2-3 rounds of author reviews, including final review/approval • Agency responsible for poster uploading and/or poster printing/shipping • Submission to single conference (encore submissions fall under a separate activity definition)	
Assumptions that can affect hours	**Rationale for the assumption**
Accepted abstract (disposition notification received) before work begins, direction to agency to initiate poster development at risk, data, and references provided	Streamlined input (inclusive of a complete data package) reduces development time
Use of existing poster template	De novo templates require additional time for design and internal reviews
Total number of authors (<10 vs 10-20 vs >20)	Higher numbers of authors increases time for follow-ups, approvals, and documentation (e.g., author forms, congress forms)
Development of slides for author kickoff/briefing call	Requires time for content development
Agency incorporating internal/external author feedback	Requires time for comment consolidation and integration
Rounds of internal client reviews (including IP approval if needed)	Iterative feedback rounds extend timelines
Out-of-pocket expenses for printing/shipping included as pass-through costs	Inclusion of pass-through expenses in the fixed poster development rate would increase baseline cost

Create a baseline set of assumptions for common publication project types (eg, abstract, poster, presentation, manuscript)

Enhance clarity and consistency in cost estimation across organizations, facilitating evaluations by reducing variability in agency interpretations of scope

Facilitate better alignment and transparency in publication budgeting, reducing ambiguity and need for follow-up to clarify scope

https://ismpp.memberclicks.net/orion?servId=10046

Assumptions Affecting Costs: De novo Abstract

Baseline assumptions

- Word count: ~250 words
- Timeline from kickoff to submission of 3-5 weeks
- Publication Lead is responsible for providing data package to agency
- Agency responsible for review of congress guidelines, disclosures, and other compliance and congress-specific paperwork (eg, author forms)
- Agency responsible for author outreach for approvals
- Agency responsible for ICMJE documentation, including use of publication-tracking platforms
- Agency responsible for developing full abstract draft and fact checking
  - NOTE: other abstract projects (eg, edit and style only, submission only, encore abstract) would have differing assumptions
- 2-3 rounds of author reviews
- Agency responsible for mock submission
- Agency responsible for abstract submission
- Submission to single conference

Assumptions affecting time	Cost implications
Total number of authors (<10 vs 10-20 vs >20)	Higher numbers of authors increases time for follow-ups, approvals, and documentation (e.g., author forms, congress forms)
Development of slides for author kickoff/briefing call	Requires time for content development
Agency incorporating internal/external author feedback	Requires time for comment consolidation and integration
Inclusion of a table/figure	Requires time for content development
Out of pocket expenses for submission fee included as pass-through cost	Inclusion of pass-through expenses would increase baseline cost
Late breaker	Abbreviated timelines requires enhanced coordination and communication

Summary and Next Steps for ORION

- ORION was established to identify and develop solutions to tackle long-standing pain points
- The tools discussed today aim to enhance efficiency, transparency, and alignment across stakeholders, highlighting the value of cross-functional collaboration
  - Value to industry: obtaining more meaningful answers; streamlining decision-making by allowing for easier comparisons across agencies
  - Value to agency: providing clarity and reducing the effort required to generate responses
- User feedback and guidance will inform future focus efforts and expansion


Thank you!
Attendee Q&A

Upcoming ISMPP U Webinars

November 2025:

We've identified the congress… Now what?

December 2025 APAC ISMPP U:

Use of AI for searching & summarizing literature

ISMPP Podcast: In Plain Cite

September 2025:

Practical Tips for Amplifying Medical Publications Through Social Media

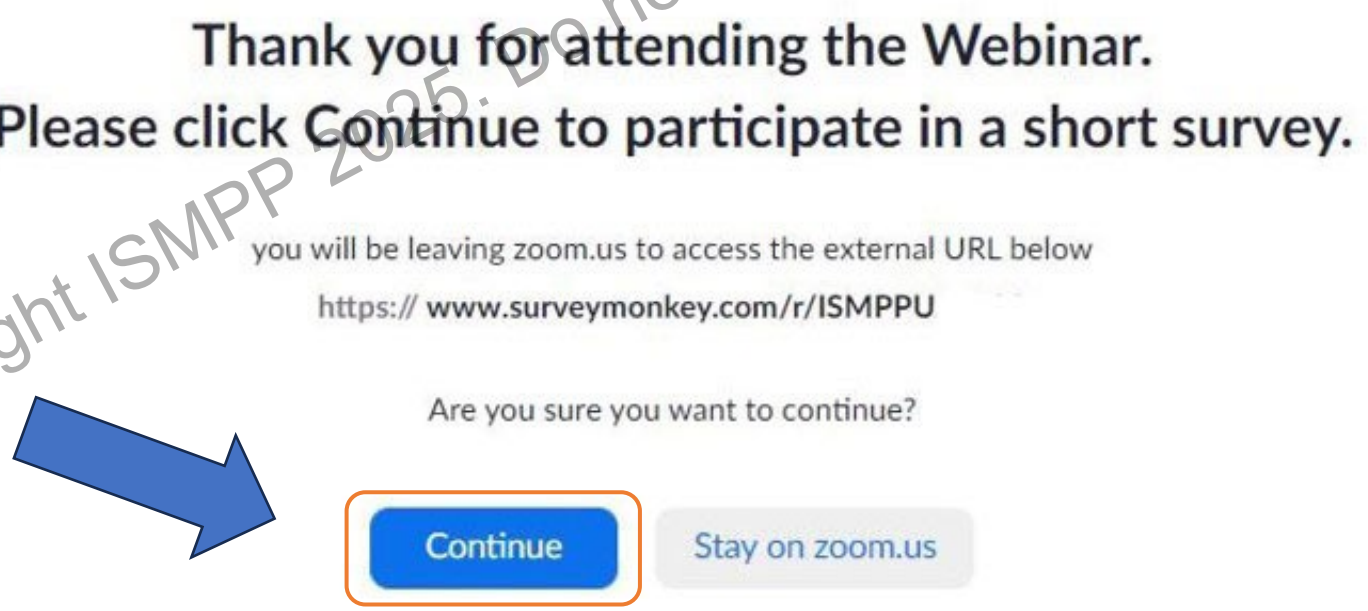
October 2025:

From Conflict to Consensus: Best Practices and Pitfalls in Publication Steering Committees

Thank you for attending!

We hope you enjoyed today's presentation.

After closing out of Zoom, please click the CONTINUE button on your screen to take our short survey. Thank you!



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