

FURNITURE PARTNER SELECTION: BEST PRACTICES + PROCESS OUTLINE

Furniture is highly specialized and should be leveraged in developing real estate and workplace solutions. Although you and your client have many choices when selecting your furniture dealer, you should strive to select a partner who understands your vision and has the resources and services to help create an inspiring space based on your culture and brand. It's important to choose a dealer that can also provide post-occupancy support to assist with the change to the new environment.

*Commoditizing furniture to compare “apples-to-apples” leads to diluted solutions, and only basic product applications, which doesn't serve the client or the project. **Choose a partner, not a price point.** If pricing is drastically different from one supplier to another, there is likely a significant variation in the specs. If you and/or your client have a preferred dealer that isn't the low price, have a conversation with that dealer and negotiate! Help yourself and your client get what they want.*

Overall Best Practices:

- Doing the right things at the right time.
- Creating value for the client.
- Engaging a supplier early in the process to fully leverage their expertise.
- Eliminating excess work and duplication of efforts (full technical specs which have been “dumbed down” to enable apples to apples comparisons, block plans that don't allow for panel creep, for example).
- Getting the right solution for the client while elevating your role as the Designer.
- Ensuring your dealer partner can appropriately manage and handle the project complexity from order to installation.

PROCESS:

1. Issue a Request for Qualifications (RFQ) to Pre-Qualify potential suppliers. (Example RFQs available upon request.)
2. Evaluate RFQ responses and short list to a maximum of three (3).
3. Invite short-listed vendors to meet with client, perhaps in their existing space, and hear first-hand what the current state challenges are for them. What's working and what isn't?
4. Tour/Interview qualified suppliers – and, again evaluate quantitatively (see attached Key Criteria Evaluation form)
 - a. Have a short, private meeting room at the conclusion of each tour and take 5 minutes to fill out the evaluation while the information is fresh.
 - b. After the final tour, take 20-30 minutes in a private meeting room to compare evaluations and discuss preliminary short list or award of project.
5. Shortlist to two (2) or award based on fit and negotiate a mutually agreeable pricing structure (similar to selecting a GC based on interview and negotiated fees).
6. Project tours and/or manufacturer HQ showroom tour. (Optional and recommended for Major Projects after short-listed to two potential partners.)
7. Shortlist and go to RFP DESIGN FIRM REQUESTS:
 - One-page Executive Summary
 - Workstation + Private office Plan View and Rendering (cluster and individual). Dealers create typicals for the primary functions: primary workstation(s) and private office (usually 3-4 options each).
 - Pricing: For workstations, per cluster. Including labor.
 - Optional: Task seating options with pricing.
 - Sample Schedule
 - *Don't include ancillary at the RFP phase – utilize the selected dealer's resources to provide options.*
8. Award based on best fit, considering product and services solutions and dealer/manufacturer team. Remember: Use pricing as a negotiation tool, not a decision-making tool!

9. Optional Mock-up: Select a station (or modified version) to mock-up, this may occur prior to award or after, depending on the situation.

REQUEST FOR QUALIFICATIONS: *Example of RFQ outline.*

The intent of this RFQ is to understand your dealer and manufacturer capabilities, product offering and project approach.

Once responses are received and evaluated, we may request showroom tours/presentations by short listed vendors in an effort to award the project to the dealer who presents the capabilities and products best aligned with the project's goals and criteria for success.

CLIENT BACKGROUND

(Example) ABC Company is a direct real estate investment program with a daily net asset valuation. This innovative real estate investment trust (REIT) owns and operates a diversified portfolio of high-quality real estate assets. The goals of the project are as follows:

1. Provide a quality and productive work environment that is safe and comfortable and that will contribute to the client's goal of the creation of successful, long-term relationships with clients, a dedication to the profession and a desire to be good corporate citizens in the communities where we live and work.
2. Provide a space that fosters collaboration.
3. Provide a work environment that reflects and supports their core values.
4. Provide an energized, vibrant and interactive work environment that supports creativity, innovation and productivity.

GENERAL PROJECT SCOPE

- Square footage
- Workstation/Office quantity
- New construction or occupied phased remodel?
- Timing

DESIGN INTENT

(Example, from Design firm) The goal from a design perspective is to create a light, bright, and energetic space. Maintaining access to views and using as much glass as possible was a key design driver. Therefore, the floor plan strategically places the high-walls together and offices have full-glass fronts to maximize views and provide high visibility and energy. The space should encourage comfortable collaboration as you flow through the space while still feeling professional. Clean lines coupled with simple textures and pops of color are used to add interest.

RESPONSE FORMAT

1. Dealer Overview/Executive Summary
 - a. Describe your organization's structure, including subsidiaries and business alliances.
 - b. List key personnel that would be utilized if you are awarded the business. Provide names and responsibilities within your company, years with the company and proposed responsibilities on the account. Also include each team member's relevant experience with similar clients/jobs. Individuals listed should represent the full scope of the team, from sales and design to operations and project management. Include how these individuals will make the process go smoothly for the client.
 - c. Describe how your firm will utilize strategic alliances, affiliate companies, or subcontractors in performing the scope of work of this RFP.
 - d. Describe how your company/your team will support ongoing facility service support for furniture moves-adds-changes after the project install.

- e. Describe any examples of your company's industry leadership, including public recognition or awards your company has received related to employee satisfaction, business ethics, community involvement, product/service competency, and customer service.
 - f. What can your firm provide customers beyond the scope of office furniture products?
2. Company Stability: Please provide a brief history of your firm; include any ownership changes or turnovers, number of employees, and years in business.
 - a. How long has the current ownership and management team been in place?
 - b. For any strategic partners/manufacturers that will be utilized for this project, indicate length of relationship and the qualification process for determining strategic partners.
3. Project team: Provide brief bios, relevant experience and defined project roles for your proposed project team.
4. Project Approach and Implementation: Provide a detailed description of how organization approaches the environment as a whole and how they solve for the unique challenges the client may be facing.
5. Experience: Provide three project examples with references for projects that you have completed in the last 3 years. Please include:
 - Brief project narrative, number of people, square footage, specific scope completed by your firm, optional project sell.
 - Contact name, title, and phone number.
6. Product solutions: Showcase a range of appropriate products/solutions you can offer from a work station, private office, and ancillary perspective, which align with the overall aesthetic vision, budgetary goals and functional requirements outlined in the Project Overview and Design Intent statements.

Selecting a Furniture Partner: Key Criteria to Consider

- PRODUCTS 1 2 3 4 5
- Breadth and depth to provide full range of options
 - Demonstrated ability to achieve desirable solutions
 - Quality and Warranty

- EXECUTION 1 2 3 4 5
- Technical competence: projects completed on time and on budget, met/exceeded client expectations
 - Communication tools
 - Ability to handle complexity in installation and project management

- EXPERTISE 1 2 3 4 5
- Areas of expertise and experience align with your needs and interests (workplace strategy, change management, technology, custom solutions, etc.)
 - Background and Qualifications
 - Resources: tools, research, uniquely qualified specialists

- CHEMISTRY 1 2 3 4 5
- Overall chemistry
 - Individual/Team strength: right players in the right roles
 - Confidence in the Team

Asking the Right Questions

Showroom tours typically include the following components:

- Team member roles and experience
- Process Overview/Project Approach
- Product tour

Make sure they cover all of these topics, and that you have a clear understanding of WHAT the firm is about, resources, and WHO the team is/roles of the individuals.

Additionally, you might consider asking some of the following questions to gain a deeper insight into their approach and the individuals you would be working with on your project:

1. (client's) biggest challenges are _____ and _____. How have you helped solve for these with other clients?
2. How do you measure project success?
3. Describe one of your favorite projects – what made it a favorite?
4. Is there anything else we should consider that we haven't asked about?