

The background of the entire page is a photograph of three people—two men and one woman—sitting at a long wooden desk in a bright, modern office. They are all looking at their laptops and smiling. The woman is on the left, and the two men are on the right. The office has large windows in the background, letting in natural light. A blue diagonal graphic element overlays the bottom left portion of the image, containing the title text.

Cvent Venue Sourcing Certification

Prep Guide

VENUE SOURCING CERTIFICATION

A certified Cvent Venue Sourcing planner should be able to:

- Create, send, and manage an RFP using Cvent venue sourcing software.
- Search for suppliers on the Cvent Supplier Network and include them in RFPs.
- Effectively run reports with information across multiple RFPs.
- Apply advanced professional features like NSOs and custom questions in their RFPs.
- Demonstrate basic familiarity with the supplier side of the RFP process.

Eligibility – All Cvent Venue Sourcing certificate candidates should:

- Preferably be users of an active Cvent account.
- Preferably have experience creating and managing RFPs using Cvent solutions.

The Exam

The exam will consist of 63 multiple-choice questions designed to test your knowledge of the RFP process using Cvent solutions. The exam is not open book.

Preparation

To successfully achieve your certification, we recommend experience using the Cvent Supplier Network for venue sourcing, thoroughly studying the contents of this guide and attending Cvent's live or on demand webinars about the Cvent Supplier Network. You can sign up for the webinars on the [Training Resources Page](#).

Additional Recommended Resources

In addition to this preparation guide, [join a virtual certification study group](#) for an in-depth review and dedicated time to get your questions answered by a Cvent expert. The Cvent Community contains training and articles listed in this guide. Each resource is only listed once but may also be helpful when studying other sections.

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STUDY GUIDE



Not sure where to start? Use these tips to begin studying!

Review the recommended training

Becoming familiar with the materials in this guide will set you up for success. There are live training classes, videos, guides and articles full of information. Set some time aside to look over the resources and make sure you are up to date on the latest Cvent knowledge.

Get hands on!

We encourage you to try things out. If the administrators of your account agree, you are free to create a test RFP to use while you practice for your exam. Just do not send it to suppliers as this can cause confusion. You can delete your test later.

Ask yourself

Read over each objective like it's a question on the exam and ask yourself if you know the answer. You may even want to take notes related to each item.

For example, to determine if you are prepared for the objective...

"Define the RFP statuses and proposal statuses"

...you may want to ask yourself:

"What are the RFP and proposal statuses and what does each mean?"

If you are not sure, refer to the recommended resources in that section.

Practice with Sample Questions

The sample questions on the following pages are designed to be like questions you will see on the exam so you can become familiar with how the questions will appear.

These questions are intended only to serve as an example and are not a comprehensive review of all possible material—but reviewing them can help you prepare!

NAVIGATE THE SUPPLIERS SOLUTION

Finding the right venues for your meetings is an involved task. Luckily, Cvent groups the whole process in one place to make everything easy for you to find. Everything related to finding suppliers, reviewing supplier information, creating requests for proposals (RFPs), sourcing your meeting and reporting on the results is all conveniently located under the **Suppliers** solution.

Locate existing RFPs in the system

Using the account-wide search option


At the top right is a magnifying glass icon that opens an account-wide search. Enter the RFP code or name into the search toolbar that appears to help locate the RFP in your account.

RFP Search

All RFPs can be found by going to the **Suppliers** solution and clicking on the **Manage RFPs** page. From there, you can use **RFP Search** under Section Links on the left. This gives you the option to search for the RFP using a variety of criteria, such as name, type, status, dates, etc.

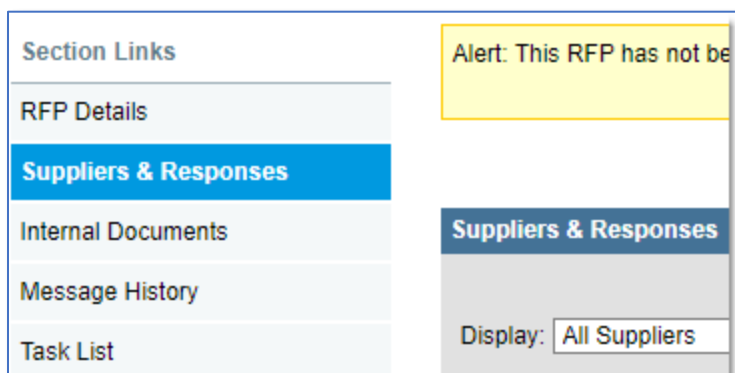
The screenshot displays the Cvent Suppliers solution interface. At the top, the 'Solutions:' dropdown is set to 'Suppliers'. The 'Recent Items' dropdown is open, showing a list of recent RFPs: ABC Sales Incentive Trip, ABC Sales Trip2, ABC Annual Conference, ABC TEST RFP, Kelsey's Negotiated Rate, Luxury Homes Conference 2021, Purple Corp Annual Sales Conference - DO NOT DELETE, ION Training, xxx, and ABC Sales Trip. The 'RFP Search' form is visible, with the following fields: RFP Type (Meeting Space and Sleeping Rooms), Return Citywide RFPs (Yes), RFP Code, RFP Name (incentive), Organization, Key Contact Last Name, Venue/Service Name, Internal Note, Date Type (Created Date), After (1/1/2020), and Before. A 'Search' button is located at the bottom right of the form.

Recent Items

You can also find the last 10 items you were working on under **Recent Items** on the top right of your account screen, regardless of where you are in the Cvent system. Recent RFPs are marked with the  icon.

Navigate to the Suppliers & Responses page

After you have located the RFP, click on the RFP name and you will see **Suppliers & Responses** on the left under Section Links. Here, you can see all the suppliers that have been added to the RFP as well as other information, such like last send dates and proposal statuses.



Create custom views on the Manage RFPs page

Knowing how to effectively organize your account will increase your efficiency and comfortability when using the Cvent Supplier Network.

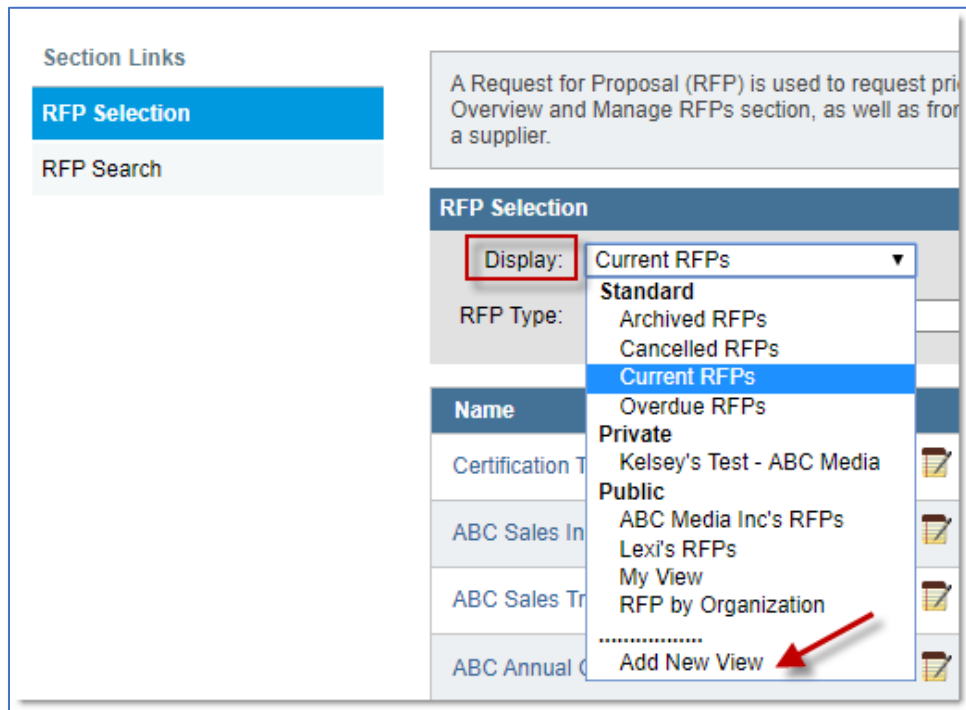
Access your views

You will find three views on the Display dropdown under RFP Selection on the **Manage RFPs** page. These views show you different RFPs depending on the current status of the RFP:

- **Current RFPs** - These are drafts, pending (awaiting approval), and active RFPs.
- **Cancelled RFPs** - These RFPs were cancelled and are not open to receive bids.
- **Archived RFPs** - Awarded RFPs are automatically archived 30 days after the decision date. You can also manually archive RFPs under **RFP Administration**. *You can only archive Awarded RFPs.*
- **Overdue RFPs** - These are unawarded RFPs that are past their decision dates.

Add a new view

You will find the option **Add New View** in the Display dropdown. This allows you to create your own custom views based on your own unique criteria. Start by naming the view and adding a description. You can determine the order your RFPs will be listed in using the Default Column Sorting and Sort Order dropdowns. You can add up to six columns for display in the view. You have the option to make the view visible to only yourself or to all users in the account. Lastly, you can add filters and only display a certain type or RFP on this view.



Create custom views on the Suppliers & Responses page

Access your views

Like the **Manage RFPs** page, the **Suppliers & Responses** page also has views. The system's predefined views are based on proposal statuses and show supplies in those statuses. You will find more details on what these statuses mean on page 26.

Add a new view

You will find the option **Add New View** on the Display drop down. Start by naming the view and adding a description. You can determine the order the suppliers will be listed in using the Default Column Sorting and Sort Order dropdowns. You can add up to seven columns for display in the view. You have the option to add filters based on the proposal status or a component in the proposal information to limit the suppliers shown in your custom view.

Additional Recommended Resources

- [Supplier Network Training for Planners](#)
- [Beyond the Basics](#)
- [Managing Your User Account RFP Settings](#)

CREATE AND REVIEW AN RFP

Explain the differences between the RFP types

The first step in creating any RFP is choosing the best RFP type for your event. The two most common RFP types are the Advanced RFP and the Quick RFP. When selecting your RFP type, consider:

- A **Quick RFP** is a simple form and requires the basic information about your event.
- An **Advanced RFP** allows you to add an extensive amount of details including contractual requirements, decision factors, specific meeting room sizes, setups and much more.
- **Citywide RFPs** are intended for events that will be hosted across multiple venues and hotels. They allow you to target specific questions to the venues relating to the requirements. The sleeping room grid automatically calculates the peak sleeping nights needed so that hotels can properly allocate their inventory to your request. *You can only create a citywide RFP by starting with the Advanced RFP type.*
- A **Restaurant RFP** is specifically designed to be sent to restaurants asking for pricing and availability.



Step 1: Select Your RFP Type

What type of RFP do you need to create for your event?

- ☒ **Advanced RFP**
This form is used to request pricing and availability from hotels and event venues. This form contains more complex requirements about your event, such as decision factors, contractual requirements, and meeting agenda items.
- ☐ **Quick RFP**
This simple form is used to request pricing and availability from hotels and event venues. This form contains minimal and basic requirements about your event.
- ☐ **Restaurant RFP**
This form is used to request pricing and availability from restaurants for your event, such as private dining, group meals, and lunch or dinner meetings.
- ☐ **Copy an Existing RFP**

Note: Once you create an RFP of one type, you generally cannot switch it to another. The only exception is converting a Quick RFP to an Advanced RFP.

Create an RFP by effectively using the predefined components in the wizard

Step 1 - Select your RFP type

To create an RFP, start by clicking **Manage RFPs** in the top toolbar and then select **Create New RFP**. Choose the type of RFP that best suits your needs for this event. You also have the option to copy an existing RFP if that saves you time. Click **Next** to move to step 2 and move through the remainder of the RFP creation wizard.

Step 2 - Enter your RFP details

Here, you enter key details about the RFP:

- **RFP Name** - How you and the receiving suppliers will refer to the RFP in the account.
- **Response Due Date** - The deadline by which suppliers are asked to submit proposals for this RFP. This date is not binding, and suppliers can submit proposals after this date if the planner has not yet closed the RFP.
- **Decision Date** - The date you expect to award the business.
- **RFP Description** - A general description of the RFP.
- **Internal Note** - Include any helpful information to identify the RFP. This can only be seen by you and other users of your account and is not visible to the suppliers.
- **Key Contact Information** - Include the information of the best person suppliers can contact for the RFP. This information populates from My Profile for your first RFP. For all subsequent RFPs, it will copy the details from the last RFP you created.

Step 2: Enter Your RFP Details

RFP Name: ABC Incentive Trip

Response Due Date: 09/23/2021 ?

Decision Date: 10/21/2021 ?

Currency: U.S. Dollar

Will this event be hosted at multiple hotels or qualify as a citywide event?

☒ No, this event will be hosted at a single venue.

☐ Yes, this event will be hosted at multiple venues or qualifies as a citywide event.

RFP Description: Insert Saved Message ?

This Annual Conference is a yearly meeting where the members meet to highlight major advancements and achievements as well as to honor those who have excelled in the industry in the past year.

2,308 characters remaining [Add to Saved Messages](#)

Decision Factors: Insert Saved Message ?

Sleeping room rate
Food and beverage packages

2,454 characters remaining [Add to Saved Messages](#)

Internal Note: Don't forget to discuss this with my colleague as this is our first Citywide event.

Can suppliers forward this RFP to other suppliers?

☐ No, only suppliers I send this RFP to can respond.

☒ Yes, suppliers that receive this RFP can forward it to other suppliers.

When reporting on Proposal Costs, do you want to include your revisions?

☐ No, do not include my revisions.

☒ Yes, include my revisions.

Other key items to complete on this screen include:

- *Can suppliers forward this RFP to other suppliers?* - If you choose No, only those suppliers you send the RFP to are able to respond. Selecting Yes allows your RFP recipients to forward your RFP on to other suppliers if, say, they are not available but have a sister property that might be. Also, select Yes if you are sending your RFP to any National Sales Offices (NSOs) or a Convention and Visitors Bureau (CVB) and would like them to loop in venues that meet your requirements.
- *When reporting on Proposal Costs, do you want to include your revisions?* - You can edit proposals submitted by suppliers if need be (discussed later in this guide). Choose Yes if you would prefer your edits to appear in reports. Leave No if you would prefer to always report on the supplier's original response.
- *Would you like to receive an email notification each time a supplier responds to this RFP?* - Choose No if you prefer to find your responses in Cvent only. Choose Yes to be alerted by email on all responses. **Add Recipient** is a useful option to copy in other stakeholders who will be monitoring the progress of your RFP.
- *Is there an expected commission to be paid if the RFP is awarded?* - If you expect commission on the RFP, enter your expected rate and use the **Add Section** button to enter in what you expect this commission to cover: rooms, F&B, meetings space, etc.

Step 3 - Enter your event details

You can fill out additional information regarding your organization. If you are sourcing on behalf of an organization, enter your client's organization details here instead. If you choose to keep your client's details confidential until contracting, you can hide the details from suppliers during the sourcing phase. The "Additional Features" section of this guide discusses in more detail how to configure the organizational profiles used in this section.

Step 3: Enter Your Event Details

What is the background of the organization holding this event?

Hide this organization's background information from suppliers? ☐ Yes ☒ No ?

Organization: ABC Media Inc. **City:** Winston-Salem

Organization Type: Corporate **State/Province:** North Carolina

Industry: Media & Entertainment **ZIP/Postal Code:** 27109

Address 1: 1834 Wake Forest Road **Country:** USA

Address 2:

Address 3:

Organization Logo: You have not uploaded a logo. ?

Employees: 151 - 300 **Avg. Attendees/Event:** 51 - 100

Events/Year: 20 **Avg. Room Nights/Event:** 151 - 300

Single Day Events: 40% **Total Attendees/Year:** 501 - 1,000

Multi Day Events: 60% **Total Room Nights/Year:** 2,001 - 5,000

Organization Information: For 37 years, ABC Inc. has created award-winning media strategies and managed all aspects of production and design. Our team of technically savvy and inspired professionals is dedicated to continuing this legacy by developing media solutions across the spectrum, from expertly crafted videos to interactive digital media products. We have the talent, the tools, and the know-how to engage your audience.

2,096 characters remaining

Continue filling out the event information, including the event name and expected attendees per day along with the event start and end dates. You can also indicate whether the dates are flexible by checking the option on the bottom right corner. If you mark that your dates are flexible, you will automatically be asked to enter a potential alternate date range for your event.

Sometimes, you may not have set dates for the event and are willing to work with the time you can get the best deal. Click Add Alternate Date to add even more potential alternate dates that would work for your event, if applicable. In the Advanced RFP, you can add up to 11 sets of dates for a total of 12. In the Quick RFP, you can add up to 3 sets of dates for a total of 4.

Lastly, you can mark whether this is a repeat event that has taken place before. If it is, complete the event information. This increases the likelihood that suppliers will respond quickly to your proposal request.

What are the details for the event?

Event Name: Total Meeting Space:

Attendees (Per Day): Largest Meeting Room:

Reference Number: Contract Signature Location:

Event Type: Total Budget: USD

| | Start Date | End Date |
|-------------|--|--|
| Event Dates | <input type="text" value="12/1/2021"/> | <input type="text" value="12/3/2021"/> |

☒ Dates are flexible [Add Alternate Date](#)

Business Objectives: [Insert Saved Message](#)

This event is to bring awareness to local artists in the area.

2,438 characters remaining [Add to Saved Messages](#)

Destinations Under Consideration: [No Saved Text](#)

Washington, DC
Los Angeles, CA

2,469 characters remaining [Add to Saved Messages](#)

Additional Information: [No Saved Text](#)

2,500 characters remaining [Add to Saved Messages](#)

Have you had similar events in the past?

☐ No, this is a first time event for the organization.

☒ Yes, this is a repeat event that has taken place before.

| Venue Name | City | State/Province | Date | Attendees | Room Block | Room Pickup | F&B Spend |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Tip: To increase the quality of responses, complete as many fields as you can.

Step 4 - Enter your event requirements

This step is primarily divided into two large sections for sleeping room and meeting space requirements. Start each by marking whether you will need that type of service for your event.

Sleeping Room Requirements: In this section, a table is displayed showing the nights for your event based on your event dates, beginning with initial check-in date. That check-in date defaults to the date before your event date. You can change it using the calendar icon and then clicking **Apply**. If you need to add additional shoulder dates before or after your event to the table, click **Add Day**. Then, simply enter the quantities of sleeping rooms required for each night and room type in the table. To add additional notes to any room type, use the notepad icon to the right. Utilize the copy feature if your needs are the same for multiple days of the event.

The screenshot shows the 'Step 4: Enter Your Event Requirements' window. The 'Sleeping Room Requirements' section is active. It includes a question 'Do you need sleeping rooms?' with 'Yes' selected. Below this is a 'Check-In Date' field set to '11/30/2021' with a calendar icon and an 'Apply' button. An 'Add Day' button is also present. A table lists dates from Tuesday, Nov 30, 2021, to Thursday, Dec 02, 2021. The table columns are: Date, Any (Run of House), Single (1 Bed), Double (2 Beds), Suite, and Staff. Each date row has input fields for these categories. Below the table is an 'Occupancy Per Room' dropdown and 'Copy' and 'Delete' buttons. At the bottom, there is a 'Budgeted Room Rate' field set to 'USD' and another 'Add Day' button.

| | Date | Any (Run of House) | Single (1 Bed) | Double (2 Beds) | Suite | Staff | |
|--------------------------|--------------------|--------------------|----------------|-----------------|-------|-------|--|
| <input type="checkbox"/> | Tue, Nov 30 2021 | 40 | 80 | 20 | 0 | 0 | |
| <input type="checkbox"/> | Wed, Dec 01 2021 | 40 | 80 | 20 | 0 | 0 | |
| <input type="checkbox"/> | Thu, Dec 02 2021 | 40 | 80 | 20 | 0 | 0 | |
| | Occupancy Per Room | | | | | | |

Meeting Room Requirements: Here, you enter the requirements for any meeting space and meals required of the supplier by adding items to create a sort of agenda.

The screenshot shows the 'Meeting Room Requirements' window. It includes a question 'Do you need meeting rooms or event space?' with 'Yes' selected. Below this is an 'Organize By' dropdown set to 'Agenda Item' and a 'Show measurements in which unit?' dropdown set to 'Imperial (sq. ft.)'. There are links for 'Space Calculator' and 'Metric Converter'. A table lists agenda items. The first item is 'Networking Session' with 'Day/Time' 'We, Th, Fr 4:30 PM - 6:30 PM' and 'Room Request' '2,000 people'. Below the table are 'Copy' and 'Delete' buttons. An 'Add Item' button is highlighted with a red box.

| Agenda Item | Day/Time | Room Request | Edit |
|---|---------------------------------|--------------|------|
| <input type="checkbox"/> Networking Session | We, Th, Fr 4:30 PM - 6:30 PM | 2,000 people | |

To add new items to your agenda, click **Add Item** and enter the details in the pop-up window.

The screenshot shows the 'Room Requirements' pop-up window. It includes a 'Setup Type' dropdown set to 'Classroom'. Below this are fields for 'Room Size' (40) and 'Sq. Mtr.' (dropdown). There is a 'Number of People' field set to 15. Two questions follow: 'Require a 24-hour hold for the room of this agenda item?' and 'Require suppliers to provide room details for this agenda item?'. Both have 'Yes' and 'No' radio buttons, with 'No' selected for both. At the bottom are 'Save', 'Cancel', and 'Save and Next >>' buttons.

- **24-hour hold** - Select Yes if this agenda item will be used over multiple days of the event and you do not want to tear down and set up the space each day.
- **Require room details** - This is a great option if you need specifics from the venue regarding the dimensions, ceiling height and name of the room they will assign.

If the new item information is the same as the existing item, simply select the item and click **Copy**. Choose the selected dates and click **Apply**. To modify any of the item details, click the edit icon and adjust the information. Additionally, you have the space calculator tool to help determine the amount of space needed based on number of attendees and set up.

The last section of this page is for **Meeting Packages** where you can indicate if you need package pricing options, such as daily delegate rates, from the supplier.

Step 5 - Select your proposal preferences

Suppliers typically provide a full range of services, such as food and beverage, internet, audio-visual equipment, etc., in addition to meeting space and sleeping rooms. This step allows you to select which items suppliers must provide pricing for (required) or whether it is optional.

| Step 5: Select Your Proposal Preferences | | | |
|--|----------------------------------|----------------------------------|----------------------------------|
| Select which information to make optional, required, and hidden from suppliers in the RFP. | | | |
| Proposal Field | Optional | Required | Hidden |
| Average F&B Costs | | | Select All |
| Total F&B Minimum | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Break - AM | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Break - PM | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Break - Drinks Only | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Break - Snacks and Drinks | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Breakfast - Continental | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Breakfast - Buffet | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Breakfast - Plated | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |

Best practice: Mark any items you do not require or care about as hidden. This will remove them from your RFP. The fewer the items on your RFP, the faster suppliers will respond or you could end up with pricing that don't need.

Step 6 - Custom questions

If you have default custom questions built into your account, whether these are created at the individual user level or the account level, you will see these listed here. *More information about creating default custom questions can be found in the Additional Features section of this guide.*

Review this list to determine if these additional questions should be asked to suppliers to help you make your decision on the right venue. You can choose to reorder or delete any questions that are not relevant for the RFP.

Step 6: Set Your Custom Questions

Delete

*1. Will you provide dressing rooms for the artists? If so will there be an additional fee?

To add additional custom questions, complete the RFP wizard and then you will have the option to add more. If you do not have any default questions built into the account, you will move directly from Proposal Preferences to Other RFP Details.

Step 7 - Other RFP Details

Here you can enter any additional information regarding your contractual requirements and billing information. During this step, you can also choose to upload additional attachments, such as an event write-up with more detail on your requirements or an outline of your policies.

Step 7: Enter Other RFP Details

What are the billing details of your event?

Concessions/Contractual Requirements:

Insert Saved Message ?

Concessions: Free Wi-Fi, Free parking for guests

2,452 characters remaining [Add to Saved Messages](#)

Billing Information:

Insert Saved Message

Will be paid for on a Master Credit Card.

2,459 characters remaining [Add to Saved Messages](#)

Do you have any files you would like to include?

Select an existing file from your document library:

[Browse...](#) [Upload File](#)

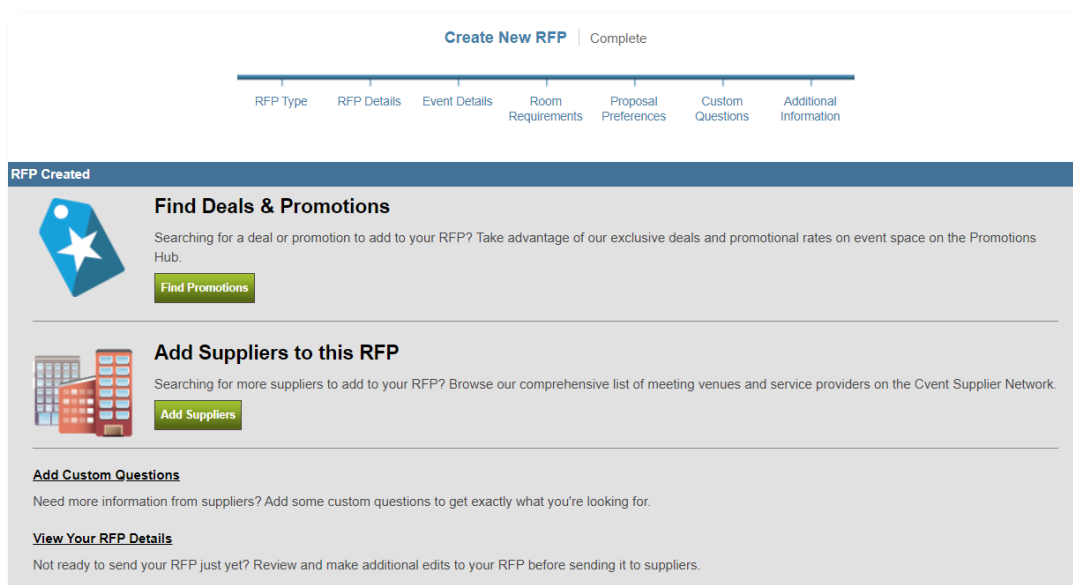
Select a file from your computer to upload:

[Choose File](#) [No file chosen](#) [Upload File](#)

RFP Complete

After completing the RFP wizard, you have a few options to take:

- **Find Promotions** - Begin your venue search by finding deals that suppliers are offering to host your meeting. *More information about Promotions can be found in the Search the Supplier Network section of this guide.*
- **Add Suppliers** - Conduct your venue search immediately if you are ready to send off the RFP. *More information about the Venue Search can be found in the Search the Supplier Network section of this guide.*
- **Add Custom Questions** - To request additional information from suppliers, add new questions to your RFP. Click **Add Custom Questions**, then **Add Questions** to complete the wizard. You can also add, move and rearrange the custom questions created by clicking the **Actions** button. Once you create questions, you can store them in the question library within Preferred section which you can then pull into future RFPs. *Learn more about custom questions in the section of Additional Features.*
- **View Your RFP Details** - You can review your RFP requirements and make any necessary edits before sending it to any suppliers.



Identify ways to save time when creating an RFP

Copy an existing RFP

You can leverage existing RFPs to create new ones, whether your requirements are similar to a previous request or you are sourcing a repeat event. When you click the button **Create New RFP**, choose the option “Copy an Existing RFP” on Step 1 and then find the RFP you would like

to copy. You can also copy the suppliers selected from the existing RFP to be added to this RFP if the new RFP is for a similar event in the same general vicinity.

Step 1: Select Your RFP Type

What type of RFP do you need to create for your event?

☐ Advanced RFP
This form is used to request pricing and availability from hotels and event venues. This form contains more complex requirements about your event, such as decision factors, contractual requirements, and meeting agenda items.

☐ Quick RFP
This simple form is used to request pricing and availability from hotels and event venues. This form contains minimal and basic requirements about your event.

☐ Restaurant RFP
This form is used to request pricing and availability from restaurants for your event, such as private dining, group meals, and lunch or dinner meetings.

☒ **Copy an Existing RFP**

Prepopulate information from saved messages

You can save messages that you think you will use across multiple RFPs. You can then pull in your saved messages when entering, say, the RFP description or meeting room requirements, when creating an RFP. You can save up to 10 messages per box, which are broken down to 5 at your individual user level and five at the overall account level.

RFP Description:

Your Saved Text

| Action | RFP Text | Saved Date |
|-------------------------------|---|-------------|
| Select Remove | Test | 20-Sep-2016 |
| Select Remove | This is a yearly meeting where the members meet to highlight major advan... | 23-Jul-2014 |

Decision Factors:

Define default proposal preferences

Configure how each cost should be included in proposals by default at the individual user level under **My Profile > RFP Settings > Use Cvent's default required fields**. Select whether you prefer receiving meeting packages from suppliers. For individual costs, your choices include:

- **Optional** - Lets suppliers fill out the field or leave it empty.
- **Required** - Suppliers cannot send their proposal unless the field is completed.
- **Hidden** - This removes the field from the RFP so that suppliers do not waste their time.

Proposal Default Preferences Save

Choose which information will be shown, hidden, and required by default on proposals for RFPs.

Prefer to receive package pricing such as DDR or CMP rates from suppliers: ☐ Yes ☒ No

| Proposal Field | Type |
|-------------------|----------|
| Average F&B Costs | |
| Total F&B Minimum | Required |
| Break - AM | Hidden |
| Break - PM | Optional |

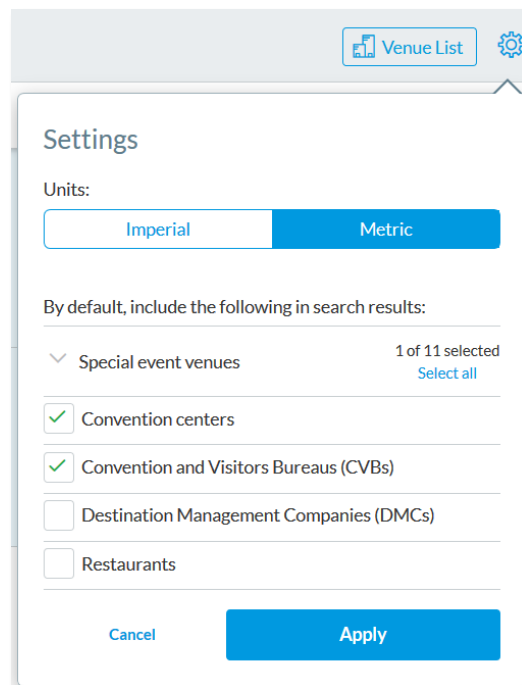
Additional Recommended Resources

- [Choosing the Right RFP](#)
- [Creating an Advanced RFP](#)
- [Creating a Quick RFP](#)
- [Copying an RFP](#)
- [Adding Questions to Your RFP](#)
- [Copying Questions](#)
- [Adding Recipients to RFP Notifications](#)

SEARCH THE SUPPLIER NETWORK AND SEND AN RFP

Personalize your search preferences

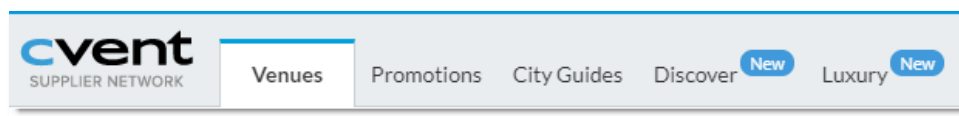
Click on the gear icon at the top right of the navigation bar on any supplier search results screen to customize the units—imperial or metric—and the types of properties shown in the search. These settings are specific to the individual user, so that every person on the team can select their own unique settings.



The screenshot shows a 'Settings' modal window. At the top, there's a 'Venue List' button and a gear icon. The modal title is 'Settings'. Under 'Units:', there are two buttons: 'Imperial' (highlighted in blue) and 'Metric'. Below this, it says 'By default, include the following in search results:'. There's a section for 'Special event venues' with a dropdown arrow and '1 of 11 selected' text, with a 'Select all' link. Below that are four checkboxes: 'Convention centers' (checked), 'Convention and Visitors Bureaus (CVBs)' (checked), 'Destination Management Companies (DMCs)' (unchecked), and 'Restaurants' (unchecked). At the bottom are 'Cancel' and 'Apply' buttons.

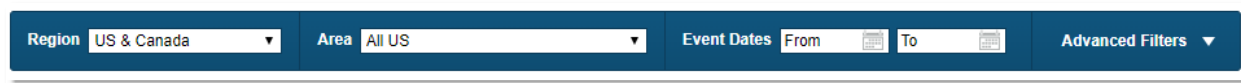
Search for venues

There are five places in your account that can be used to find qualified venues to add to your RFP. To access all, start by clicking on **Find Venues**. From there, you have the option to access the Venue Search, Promotions Hub, and City Guides. You also have the new tabs to Discover and browse Luxury options.



Promotions

Suppliers across the Cvent Supplier Network can enter special promotions and pricing to attract business to their properties. The promotions hub is a centralized location where you can find all promotions on the network in just one click. Once you find a promotion, you can review the details and click **Claim Promotion** to add it to a new or existing RFP.

A dark blue horizontal bar with white text and icons. It contains four main sections: 'Region' with a dropdown menu showing 'US & Canada', 'Area' with a dropdown menu showing 'All US', 'Event Dates' with 'From' and 'To' date pickers, and 'Advanced Filters' with a dropdown arrow.

Region **US & Canada** Area **All US** Event Dates **From** **To** Advanced Filters

City Guides

This is a one-stop shop for you when you are looking for the perfect city to host your events and meetings. The guide consists of over 11,000 pages of content filled with information like key statistics, airport and travel information, public transit details and much more about major cities around the world. This is a perfect place to look before entering the venue search.



Discover

This is a new and exciting place to start your search. Come here to discover new venues, destinations and event services by using our enhanced keyword search capabilities. Stay up to date on the industry, including new brands, new builds, renovations and mergers. This is a great place to come when you are still at the inspiration stage of your search and are looking for ideas before finalizing your event location and details.

Luxury

This is the brand-new digital format of *Elite Meetings Magazine*, which is now integrated directly into the Cvent Supplier Network. It features detailed, meetings-specific profiles of luxury hotels and resorts that planners can search and add directly to their RFPs right from the magazine. It also features articles on best practices, inspiration and ideas, industry trends and more.

Cvent venue search

The venue search is the main gateway into the Cvent Supplier Network and is the place to go to

find individual supplier listings for inclusion on your RFPs.

Begin the search by typing in a venue name, city, address or other landmark. The system will return the suppliers in the network in the vicinity of your search term. Including dates is optional and it is used to highlight venues that have indicated need dates during your requested dates. If you choose to search based on your dates, you will still see venues that don't match your need dates to give you the full range of options.

A horizontal search bar with a dark grey background. It contains four input fields: a location field with the text "Paris-Charles De Gaulle (CDG), Roissy-en-France, France", a date field with "09/25/2020", another date field with "09/27/2020", and an attendees field with "200 attendees" and a dropdown arrow. Below the location and date fields, the word "Optional" is written in small text. To the right of the attendees field is a green button with the text "Find venues" in white. Below the button, the word "Filter" is written in small text.

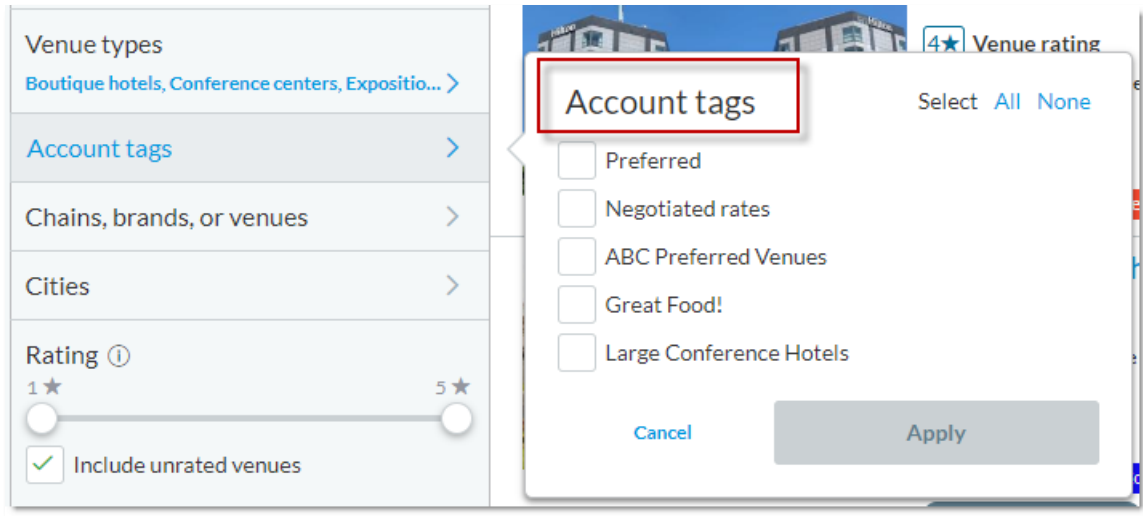
Key features on the search result screen include:

- **Map View** - This shows all your returned venues on a Google Map for an easy, interactive view. You can also utilize the Heat Map by selecting the icon in the top-right hand corner. This will color the map based on the most highly trafficked areas. You can click on the green plus icon in the top right corner of the hotel name and it will add venues to your venue list as well as number them on the map.
- **Advertising** - You will see some venues as suggestions among the search results as well as at the top and right of the page. Ad placement is purchased by suppliers. These results are independent of any user filters applied on the search and are only dependent on the area selected.
- **Sorting** – Organize the list of results in a way that helps you by changing the sort order in the top-right hand corner. You have the option to keep the results sorted by Cvent Picks, Alphabetical, Distance, Rating, and Size.

Apply filters to refine the search results

When viewing search results, there are many filters on the left side of the screen to help you narrow down the search results, including selections for specific brands or chains. You can also filter based on amenities, meeting space and other items. These filters are available in all accounts.

Account Tags are custom to your specific account. You can filter the results to only include your preferred venues or venues that you have negotiated rates with.



Account tags are typically set up by your account's Cvent administrator and reflect categories of suppliers that are of relevance to you and your specific company.

Tip: If you are looking for a specific supplier and cannot find them in the search results, use the "Chains, brands or venues" filter to make a more targeted search.

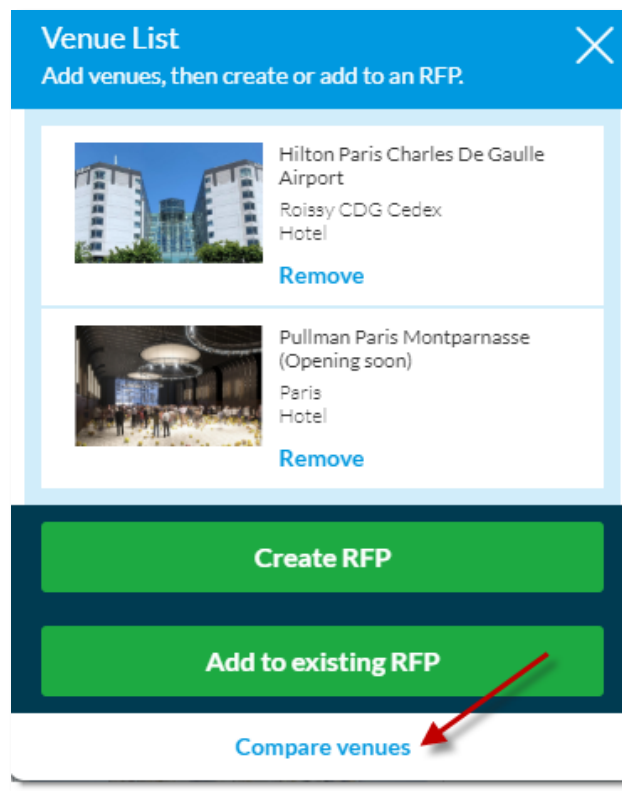
View venue details

Click onto the name of any venue to view the complete profile to help decide if you will include it on your RFP. Key features on the search result screen include:

- **Meeting space and floor plans** - The venue profile contains specifics of the meeting space and capacity in different styles. They also include floor plans to help planners get a better idea of the different meeting rooms available.
- **Weblinks and additional material** - Gather more information from this venue's website or social media accounts from the weblinks; in some profiles, you can also find a virtual tour of the property. Often, venues will host downloadable brochures or floor plans under the additional materials.
- **Lead catchers** - Scroll down to Account on the profile to see the lead catchers listed under Contacts. This is the person who is responsible for managing the RFP at the venue.
- **Notes** - Keep a record of your experiences working with this venue in the notes section of the profile. This information will be kept private to you and other users in your account; it will not be shared with the supplier.

Create a list of venues and add them to the RFP

After you have applied the relevant filters and reviewed additional information from the venue profile, select **Add to list** for any suppliers of interest to add them to your tentative list of RFP recipients. The selected venues are added to the Venue List shown at the top right of the screen. Much like a shopping cart, the RFP has not been sent to these suppliers yet, they are held on your venue list until you are ready to send. Before sending, if you have selected several venues, you can compare them. At the bottom of the **Venue List**, select Compare Suppliers. This will give you a side-by-side comparison of the high-level supplier information.



Use the **Remove** button to remove any suppliers from your tentative list. When you have a final list, click **Add to existing RFP** to add them to the RFP for sending.

Send the RFP to venues and industry contacts

After you have added all the selected venues to the RFP, you can then send the RFP. If any of the venues do not meet your requirements, you will see a warning message but can still choose to proceed. You will also get the option to copy a CVB for that area.

On the Send RFP Confirmation screen, you indicate who will be notified when your RFP is sent.

The lead catchers at each individual property are included by default. If you have set up industry contacts like National Sales Offices (NSOs – see *the Additional Features section for more information on this feature*) for the chains, brands or properties on the RFP, they will also be available for selection here. Finally, you can add any additional contacts to this RFP by clicking on **Add new contact**. You can also add an optional additional message to the RFP before you send it.

Send RFP Confirmation

The following suppliers are going to be sent the test for RFP to delete RFP. If applicable, you can edit which venue recipients and venue attachments to include.

| <input checked="" type="checkbox"/> | Contact | Contact Type | Short Description |
|-------------------------------------|---|--------------|-------------------|
| | <Venue Name> | | |
| <input checked="" type="checkbox"/> | Supplier Lead Catchers (View) | Supplier | |
| | Add new contact | | |
| | <Venue Name> | | |
| <input checked="" type="checkbox"/> | Supplier Lead Catchers (View) | Supplier | |
| | Add new contact | | |

No Saved Text

2,500 characters remaining [Add to Saved Messages](#)

If you do not want to send this RFP to individual suppliers, skip the search altogether. You can send the RFP only to your NSOs by selecting **Send to NSO Only** from **Actions** on the **Suppliers & Responses** page.

Send RFP Award RFP Actions Reports Add Venues Add Promotions

- Send to NSO Only
- Send Message

Tip: Save time by inserting saved messages with preconfigured messages by selecting Insert Saved Message.

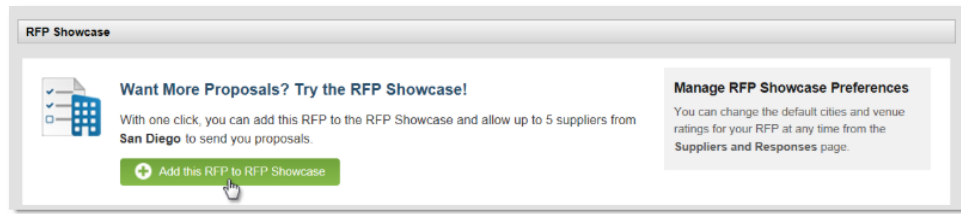
Promote your RFP on the RFP Showcase to draw additional bids

The RFP Showcase is a feature offered by Cvent that allows you to put the spotlight on your RFP and get additional responses by allowing properties that meet your RFP requirements to submit a bid. You can receive up to five additional responses from the Showcase. It is a great way to get extra options for your next event.

You can add the RFP to the showcase when sending. You can also do it after the RFP has been sent from the **Suppliers & Responses** page. In the top corner of the **Suppliers &**

Responses page, there is a banner ad that prompts you to add your RFP to the Showcase. When you choose to do so, you will be able to set your preferences.

You are required to select up to two Supplier Ratings or enter in a Budgeted Room Rate. It is important to note that both fields are simply for information purposes. They will not affect which suppliers will see your RFP in the Showcase.



Additional Recommended Resources

- [Searching for Suppliers](#)
- [Adding Venues and Sending an RFP](#)
- [Sending an RFP to an NSO Only](#)

MANAGE RESPONSES AND ACT ON RFPs

Define the RFP and proposal statuses

Two different types of statuses are used to indicate the progress of your RFP: proposal statuses and RFP statuses.

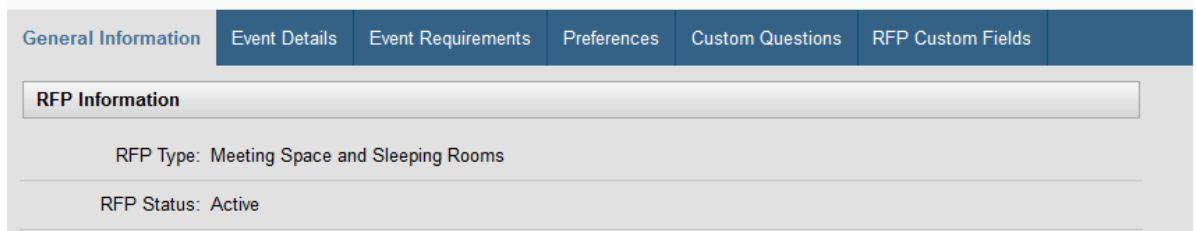
Proposal statuses: Each supplier added to the RFP has their own unique proposal status for that RFP. These statuses indicate whether the supplier has responded to your RFP and are related to each individual supplier's decision regarding your RFP. The proposal statuses are displayed on the **Suppliers & Responses** page.

| <input type="checkbox"/> | Name | Metro Area ▲ | Last Send Date | Last Response Date | Status | Lowest Room Rate | Contact Name | Phone |
|--------------------------|--|------------------|---------------------|---------------------|--------------------|------------------|----------------|----------------|
| <input type="checkbox"/> | The Beverly Hilton | CA - Los Angeles | 13-Jan-2020 4:38 PM | 13-Jan-2020 4:38 PM | Turned Down | | | (310) 274-7777 |
| <input type="checkbox"/> | Loews Hollywood Hotel | CA - Los Angeles | 13-Jan-2020 4:39 PM | 13-Jan-2020 8:25 PM | Submitted Proposal | USD \$269.00 | Marder, Jenna | (323) 491-1017 |
| <input type="checkbox"/> | Long Beach Area Convention & Visitors Bureau | CA - Los Angeles | 13-Jan-2020 4:39 PM | | Receipt Confirmed | | Johnson, Tammy | 562-544-2197 |

The proposal statuses are explained below.

| Proposal Status | Definition |
|--|--|
| Not Sent | You have added the supplier to your venue list, but you have not sent the RFP to this supplier. The last send date will also be blank. |
| Awaiting Proposal | The supplier has not yet responded to the RFP. |
| Awaiting Proposal [In Progress] | The supplier has not yet responded to the RFP but has marked it in progress to alert you that they are working on it. |
| Receipt Confirmed | This status is typically used by CVBs to indicate they are working on your request but will not submit a proposal directly. |
| Submitted Proposal | The supplier has responded to the RFP with a proposal. |
| Turned Down | The supplier has responded that they cannot accommodate the request and has not provided a proposal. |
| Withdrawn | The supplier has submitted a proposal and then later retracted it because it can no longer accommodate the request. |
| Awarded | You have awarded the RFP to this supplier |
| No Response | This RFP has either been awarded or cancelled but the supplier never submitted a proposal. |
| Declined | The supplier submitted a proposal and you declined it. |

RFP statuses: The RFP has an overall status that indicates where it is in the RFP lifecycle. This status can be found under General Information on the **RFP Details** screen after clicking into an RFP.



The screenshot shows the 'RFP Details' screen with the 'General Information' tab selected. Below the tab bar, there is a section titled 'RFP Information'. Inside this section, the 'RFP Type' is listed as 'Meeting Space and Sleeping Rooms' and the 'RFP Status' is listed as 'Active'.

The RFP statuses are explained below.

| RFP Status | Definition |
|------------------|---|
| Draft | You have started the RFP wizard but have not yet finished creating the RFP. |
| Pending | This status only applies when using the RFP Approval feature (not enabled in all accounts). You will see this status after creating an RFP but you cannot send it until approved by the account administrator and the status changes to "Active." |
| Active | You have finished creating the RFP and it can be sent to receive responses. |
| Awarded | You have awarded the business to a supplier. |
| Archived | You have manually archived the RFP, or the RFP was awarded, and 30 days have passed since its created date and decision date. |
| Cancelled | You cancelled the RFP entirely. |

Viewing and reacting to an individual proposal

After a supplier sends a proposal, their status immediately changes to Submitted Proposal. To view the details of their proposal, click the supplier name on the **Suppliers & Responses** page. This brings up a full view of all their completed proposal details, including the meeting room and sleeping room information and responses to any of your custom questions.

Response Information
Cost Summary

Supplier Details

Name: [DoubleTree by Hilton Hotel Laurel](#)
Phone: (301) 776-5300
Status: Submitted Proposal
RFP Sent Date: 17-Mar-2020 4:53 PM
Last Sent Date: 17-Mar-2020 5:46 PM
Last Viewed Date: 18-Mar-2020 11:03 AM

Bid Received Date: 18-Mar-2020 11:02 AM
Notes/Recommendations: ?
Internal Note:

Proposal Details

Currency: U.S. Dollar
Commissionable: Yes
Commission Information: 10.00

Guest Rooms: Preferred Date

Sleeping Room Needs Met: Yes

Do rates include tax?: No
Do rates include breakfast?: No

Applicable Taxes: State 6.00 %, Occupancy 7.00 %
Total: USD 16,350.00
Check-In Date: 16-Nov-2020

| | Any (Run of House) | | Single (1 Bed) | | Double (2 Beds) | | Suite | | Staff | |
|------------------|-----------------------|--------|-------------------|------|--------------------|------|-------|------|-------|------|
| | Qty | Rate | Qty | Rate | Qty | Rate | Qty | Rate | Qty | Rate |
| Mon, Nov 16 2020 | 50 | 109.00 | 0 | | 0 | | 0 | | 0 | |
| Tue, Nov 17 2020 | 50 | 109.00 | 0 | | 0 | | 0 | | 0 | |
| Wed, Nov 18 2020 | 50 | 109.00 | 0 | | 0 | | 0 | | 0 | |

Note: All rates are displayed in U.S. Dollar (USD).

Additional Fees

| | Category | Amt/Perc | Type | Applicable To |
|-------|-----------|----------|---------------|---------------|
| Tax 1 | State | 6.00 | By Percentage | Guest Rooms |
| Tax 2 | Occupancy | 7.00 | By Percentage | Guest Rooms |

In addition to viewing the proposal details, you can also take several actions towards this individual supplier's proposal using the buttons at the top of the screen. For example, you can choose to resend the RFP, send an additional message, award the bid or download the bid.

Below is a list of actions and explanation of each.

| Action | Definition | Example Scenario |
|-------------------------|---|---|
| Edit | Add internal notes or make revisions | You are a third-party planner and want to document your recommendations for your client. |
| Send RFP | Send request for proposal to the supplier | You have added new venue options to your list but have not sent the RFP to these suppliers yet and now you are ready to request a proposal. |
| Send Message | Email the supplier via the tool | You would like to complete a site visit to this venue and want to discuss logistics. |
| Award Bid | Accept the proposal sent from the supplier | After reviewing the supplier's proposal, you have decided to use this venue for your event. |
| Decline Bid | Reject the proposal sent from the supplier | After reviewing the supplier's proposal, you have decided not to use this venue for your event. |
| Add to Shortlist | Add this proposal to a shortlist of proposals that may win the business | After reviewing the supplier's proposal, you are considering it as a potential contender for the business. |
| Download | Download the proposal details as a PDF or Word document | You would like to email the details of this proposal to someone else. |

Tip: You can apply these same actions to multiple suppliers in bulk from the **Suppliers & Responses** page.


Editing a supplier's proposal

One of the actions available when viewing a supplier's proposal is **Edit**, which allows you to edit the details of the proposal.

Why would you edit a supplier's proposal? There are two key reasons:

- To add internal notes and recommendations. These cannot be seen by the supplier.
- To make minor changes that you and the supplier agreed upon. Occasionally suppliers will make minor mistakes when submitting a proposal. For instance, perhaps the supplier quoted \$15/per person for continental breakfast but forgot to specify the number of attendees. As a result, the total cost appears as \$0 instead of the full \$1,500 for the 100 attendees.

Once you make any changes, click **Save**. Any edits other than internal notes and recommendations will display in a "Revised" column, preserving the original value from the supplier for reference.

| Item | Proposed | | Revised | | | | | Display ? |
|--|---|----------|--------------|----------|-------|---------------------------------|-------------|------------------------|
| | Amount (EUR) | Quantity | Amount (EUR) | Quantity | Tax % | Tax Type | Total (EUR) | |
| Average F&B Costs | | | | | | | | |
| Break - AM  | 100.00 / Per Person Includes Tax and Service | 0 | 100.00 | 0 | | Tax and Service Inclusive | 0.00 | No |
| Break - PM | 80.00 / Per Person Includes 6% Tax and Service | 0 | 80.00 | 0 | 6 | Tax and Service Inclusive | 0.00 | No |
| Breakfast - Continental | 0.00 / N/A | 0 | 0.00 | 0 | | | 0.00 | No |
| Breakfast - Buffet | 120.00 / Per Person Includes 6% Tax and Service | 0 | 120.00 | 0 | 6 | Tax and Service Inclusive | 0.00 | No |
| Lunch - Buffet | 15.00 / Per Person Includes 6% Tax and Service | 0 | 15.00 | 100 | 6 | Tax and Service Inclusive | 1,500.00 | Yes |
| Dinner - Buffet | 20.00 / Per Person Includes 6% Tax and Service | 0 | 20.00 | 100 | 6 | Tax and Service Inclusive | 2,000.00 | Yes |

Generate RFP reports to view and compare responses

Running reports to view and compare proposals



As you receive proposals from multiple suppliers, it may be difficult to decide which venue is best for your event. Cvent provides several bid comparison reports to view proposals side-by-side in easy-to-read, organized formats.

To run any of these reports, go the **Suppliers & Responses** page and tick the checkboxes next to the suppliers you would like to compare. Then from the **Reports** dropdown, select the report

to run. Most reports will also have a pop-up allowing you to select additional fields to pull into the report. The reports can be exported into Excel to easily manipulate and share the data.

Compare Suppliers Report



This report contains summary information about the suppliers. It is ideal to use during the beginning stages of your sourcing process because it does not contain information about the proposal. This is the same report you can generate from your venue search.

| Supplier Information | | |
|----------------------------|---|--|
| Name: | Bethesda Marriott | The Hotel at the University of Maryland |
| Image: |  |  |
| Supplier Type: | Hotel | Hotel |
| Chain: | Marriott International Hotels | Independent / Other |
| Brand: | Marriott Hotels | Independent |
| Website: | view website | view website |
| Address: | 5151 Pooks Hill Road Bethesda, Maryland, 20814 USA | 7777 Baltimore Avenue College Park, Maryland, 20740 USA |
| Supplier Categories: | - | - |
| Preferred: | No | No |
| Awards and Ratings | | |
| AAA | 3 Diamonds | 4 Diamonds |
| Northstar | 4 Star | - |
| Meeting Space | | |
| Meeting Room Space: | 18,719 Sq. Ft. | 43,000 Sq. Ft. |
| Number of Meeting Rooms: | 27 | 18 |
| Largest Meeting Room: | 4,592 Sq. Ft. | 10,000 Sq. Ft. |
| Lodging Information | | |
| Number of Sleeping Rooms: | 407 | 297 |
| Number of Suites: | 8 | 29 |

Note: You can also do a quick side-by-side comparison of suppliers on screen. Select the suppliers on **Suppliers & Responses** and choose **Compare Suppliers** from the Actions dropdown.


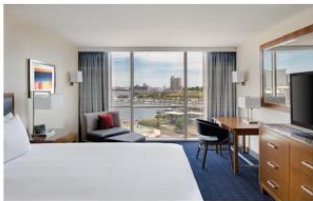
Availability Report

This report displays a summary view of dates, rates, and overall availability that the venues have submitted. It is ideal when comparing venues on numerically focused data.

| Status | Supplier | Image | Address | Availability | Proposed Dates | Room Rate | Run of House Rate |
|--|---|---|---|--------------|----------------------------|-----------------------------------|-------------------|
| DC - Washington Submitted Proposal | DoubleTree by Hilton Hotel Laurel |  | 15101 Sweitzer Lane Laurel, Maryland, 20707 USA | 1st Option | 17-Nov-2020 to 18-Nov-2020 | USD \$109.00 Rates Exclude Tax | USD \$109.00 |
| MD - Baltimore Submitted Proposal | Graduate Annapolis |  | 126 West Street Annapolis, Maryland, 21401 USA | 1st Option | 17-Nov-2020 to 18-Nov-2020 | USD \$129.00 Rates Exclude Tax | USD \$129.00 |

View Bids Report

This report is a comprehensive display of all venue background information and proposal information for each status. Each proposal status is displayed in its own tab within the Excel worksheet. This is the most popular RFP report in the system.

| | | |
|--|---|--|
| 2020 Annual Conference - Submitted Proposals RFP Code: QEWRAFSEUE 2020 Annual Conference Event Dates: 17-Nov-2020 to 18-Nov-2020 Prepared By: Cvent | | |
| Supplier Information | | |
| Name: | Annapolis Waterfront Hotel, Autograph Collection | Hyatt Regency Baltimore Inner Harbor |
| Image: |  |  |
| Supplier Type: | Hotel | Hotel |
| Chain: | Marriott International Hotels | Hyatt Hotels |
| Brand: | Autograph Collection | Hyatt Regency |
| Website: | View Website | View Website |
| Address: | 80 Compromise Street Annapolis, Maryland, 21401 USA | 300 Light St Baltimore, Maryland, 21202 USA |
| Total Guest Rooms: | 150 | 488 |
| Total Meeting Space: | 6,672 Sq. Ft. | 26,158 Sq. Ft. |
| Largest Meeting Room: | 6,560 Sq. Ft. | 14,161 Sq. Ft. |

Note: You can also do a quick side-by-side comparison of bids on screen. Select the suppliers on **Suppliers & Responses** and choose **Compare Bids** from the Actions dropdown.

RFP & Bids Report

This report displays all the RFP information in a Word document, starting with the details of the RFP and followed by the submitted proposal details.

2020 Annual Conference
Cvent

cvent Supplier Network
Request for Proposal (RFP)

RFP Details
RFP Name: 2020 Annual Conference
Response Due Date: 23 Mar 2020
Decision Due Date: 30 Apr 2020
RFP Type: Meeting Space and Guest Rooms
RFP Code: QEWRAFSEUE
Description: This is a yearly confere
Decision Factors: Cost
Location: 101 West Fayette Street, Baltimore, Maryland, 21201, USA
Billing Information: Rooming List
Room and tax to mas
Concession and Contractual Information: Free Wi-Fi, free on-sit

Key Contact Information
Contact Name: Sally Smith
Organization: Cvent Planning
Title: Lead Sourcer
Preferred Contact Method: Cvent, Email Address
Address: 100 Cvent Drive, Te

Proposal Details
RFP Name: 2020 Annual Conference
RFP Code: QEWRAFSEUE
Event Name: 2020 Annual Conference
Response Date: 19 Mar 2020 09:55
Venue Name: Radisson Hotel Baltimore Downtown-Inner Harbor
Chain: Radisson Hotel Group
Brand: Radisson
Commission?: Yes - 10.00%
Proposal Introduction: Thank you for your interest in hosting your upcoming meeting with us here at the Radisson Baltimore Downtown - Inner Harbor. At current, we do have availability on your preferred date Wednesday, November 18-19, 2020.
Included within, you'll see custom pricing specific to your meeting. Feel free to let me know if there are any further questions or concerns.

| Date Type | Event Dates | Check In Date | Event Availability | Rates (USD) |
|-----------|----------------------------|---------------|--------------------------------|-------------|
| Preferred | 17 Nov 2020 To 18 Nov 2020 | 16 Nov 2020 | 1st Option - Not Holding Space | 109 |

Responses by Destination Report

This report was designed with citywide RFPs in mind but is available to all advanced and quick RFPs. It displays a comprehensive list of information ranging from rate information to hotels over multiple major metropolitan areas. It is ideal when comparing hotels, cities (CVBs) and conference centers.

| Name | Contact | Status | Dates |
|---|---|--------------------|----------------------------|
| 2020 Annual Conference | | | |
| Submitted Proposal | | | |
| Bethesda Marriott 5151 Pooks Hill Road Bethesda, Maryland, 20814 USA Visit Website | Ola Afifi 3018206225 ola.afifi@marriott.com | Submitted Proposal | 17-Nov-2020 to 18-Nov-2020 |
| College Park Marriott Hotel & Conference Center 3501 University Blvd East, Hyattsville, Maryland, 20783 USA Visit Website | Ola Afifi 3018206225 ola.afifi@marriott.com | Submitted Proposal | 17-Nov-2020 to 18-Nov-2020 |
| DoubleTree by Hilton Hotel Laurel 15101 Sweitzer Lane Laurel, Maryland, 20707 | Eric Stein 301-206-4112 Estein@doubletreelaurel.com | Submitted Proposal | 17-Nov-2020 to 18-Nov-2020 |
| DC - Washington Hotels MD - Baltimore Hotels + | | | |

Communicate with suppliers regarding updates

Editing and resending an RFP

Plans invariably change, but luckily so can your RFP. You can edit your RFP at any time and the changes will automatically update in the suppliers account.

To make changes, navigate to the **RFP Details** section. The RFP details are divided across six tabs. Click **Edit**, edit any details that have changed and click **Save**. Click into the other tabs and repeat, continuing until your RFP is updated.

Here is a summary of what you can edit on each tab.

| Tab | Main items |
|----------------------------|---|
| General Information | RFP name, due date, decision date, commission rates, and your contact information. Best practice: If updating the event dates, add “Revised Dates” to the RFP name to help suppliers spot the change. |
| Event Details | Event dates, estimated attendees, meeting space requirements, and your profile information. |

| | |
|---------------------------|--|
| Event Requirements | Sleeping and meeting room requirements. Note: If you changed event dates, make sure they are updated here too. |
| Preferences | Fee preferences. |
| Custom Questions | Custom questions asked of the supplier. |
| RFP Custom Fields | Custom information your company is tracking. |


Best practice: After editing an RFP, resend it to notify the suppliers to notice your revisions. Click **Resend** at the top of the screen.

The screenshot shows a web interface for managing an RFP. At the top, there are buttons: Edit, Award RFP, Resend (highlighted with a mouse cursor), Close, and Print. Below these are tabs: General Information, Event Details, Event Requirements, Preferences, and Custom Questions. The 'RFP Information' section is expanded, showing the following details:

- RFP Type: Meeting Space and Sleeping Rooms
- RFP Status: Active
- RFP Code: M3NLBQ7HPVD
- RFP Name: Revised Dates - 2016 Urban Design Tradeshow
- Response Due Date: Sat, Feb 21 2015 ?
- Decision Date: Sat, Feb 28 2015 ?

A list of suppliers that previously received this RFP will appear, selected by default. Uncheck any to whom the RFP should not be resent. Click **Add Message** to add a brief description of your changes and the finish by clicking **Send RFP**. The suppliers will receive a notification with the subject line “Updated RFP.”

If you edit the RFP after a supplier has submitted a proposal, a warning icon will appear by their name on the **Suppliers & Responses** screen, alerting you that they did not respond to the latest version of the RFP. Hover over the icon to see what items of the proposal do not match your RFP.

| | | | | | |
|-----------------------------------|---|----------------------------------|---------------------|---------------------|--------------------|
| Hilton Los Angeles/Universal City |   | CA - Los Angeles | 13-Jan-2020 4:38 PM | 16-Jan-2020 6:48 PM | Submitted Proposal |
|-----------------------------------|---|----------------------------------|---------------------|---------------------|--------------------|

Sending a message related to an RFP or proposal

Choose to send an additional message to a group of suppliers. This is ideal to provide suppliers with additional details about your RFP or your internal processes for awarding RFP business.

To send a message, choose **Send Message** from the **Actions** dropdown when viewing an individual supplier’s proposal. Or do so in bulk, selecting multiple suppliers, on the **Suppliers & Responses** page.

Select the suppliers you want to message. The last person who handled the RFP or proposal is already selected by default. The possible recipients are identified by contact type and include:

| Contact type | Definition |
|------------------------|--|
| Supplier | The person who received the RFP and is coordinating the proposal |
| Proposal | The person who sent the proposal |
| In Progress | The person working on the proposal |
| NSO | The sales rep, public or private, who forwarded the RFP to this venue |
| Assignee | The person assigned to the RFP by the proposal coordinator |
| Turn Down | The person who turned down the RFP |
| Billing Contact | The person who should receive an invoice or contract once a bid is awarded |

Enter your message content. If you anticipate using this message in the future, click “Save Message for Future Proposals” to store this message in your account. Finally, click **Send**.

The screenshot shows a web-based message composition form. At the top, there is a 'From Name' field with 'Sally Smith' entered. Below it is a checkbox labeled 'Send me a summary email' which is currently unchecked. A blue header bar labeled 'Message Content' is present. Under this header, the 'Subject' field contains 'Message from Shawn Volesky Oster regarding 2020 Annual Conference'. The 'Message' field contains the text: 'Please note the dates of our 2020 Annual Conference have changed from May 20-22 to September 9-11. The RFP has been updated accordingly. I kindly ask you to submit your proposal with the revised dates in mind.' At the bottom of the message field, there is a button labeled '<HTML>'.

Note: Cvent saves a copy of all sent messages under your RFP in **Message History**. Responses from the suppliers are sent directly back to the associated email address and are not stored in the message history.

Shortlisting suppliers

As you review bids, get closer to a final decision by adding your top picks to a shortlist.

To add suppliers to a shortlist, find the supplier in your list on the **Suppliers & Responses** screen. Hover over the arrow icon next to their name and choose the option **Add to Shortlist**. Shortlisted suppliers are displayed at the top of the **Suppliers & Responses** screen. You can drag and drop them with the icon in the Reorder column to sort them into your sequential list of preferences. Suppliers are not notified if you mark them as shortlisted on your RFP.

| Shortlisted Suppliers | | | | | | | | | |
|--------------------------|--------------------|----------------------------|----------------------|----------------------|--------------------|------------------|-----------------|--------------|---------|
| <input type="checkbox"/> | Name | Metro Area | Last Send Date | Last Response Date | Status | Lowest Room Rate | Contact Name | Phone | Reorder |
| <input type="checkbox"/> | Ice Cap Inn | South Pole | 27-Mar-2019 12:37 PM | 27-Mar-2019 1:03 PM | Submitted Proposal | EUR 98.00 | Singh, Jaspreet | 232331231321 | ⌵ |
| <input type="checkbox"/> | ABU DHABI SATURDAY | South Pole | 27-Mar-2019 12:37 PM | 27-Mar-2019 12:58 PM | Awarded | EUR 100.00 | Greetham, Gabby | 111111111111 | ⌵ |

Retracting an awarded or declined bid

There are situations when you may need to retract an award or a declined bid in Cvent, for instance if you changed your mind or if the bid was marked in error.

Navigate to the **Supplier & Responses** page and click the dropdown next to the name of the supplier you awarded or declined. Choose **Retract Award** or **Retract Decline** as the case may be. In both cases, the supplier's status reverts to Submitted Proposal. The supplier is not notified in either case. You may consider using the send message functionality to alert them of the change.

| | | | | | |
|--------------------------|--------------------------|----------------------------|----------------------|----------------------|----------|
| <input type="checkbox"/> | Cvent Compass Inn | South Pole | 06-Jan-2017 11:47 AM | 06-Jan-2017 11:58 AM | Declined |
| <input type="checkbox"/> | Cvent Campus Inn | | | | Not Sent |
| <input type="checkbox"/> | Cvent Clear Water Resort | | | | Not Sent |

Track the cost life cycle using the Cost Summary

What is the Cost Summary?

An important goal when sourcing a meeting is to achieve the lowest possible budgeted costs for that meeting. The Cost Summary is an additional tool available within the RFP module that allows you to track your costs at all stages of the sourcing process, not just the costs for the final contracted supplier, and display them in an easy-to-read grid.

Here are examples of times when you might use the Cost Summary:

- You would like to share the total estimated costs for your top three shortlisted suppliers. When you contract the final property and award the RFP in Cvent, the Cost Summary will then represent the total budget for the selected supplier.
- You would like to showcase cost savings that you negotiated for the meeting and show these savings to a stakeholder.

Note: Cvent does not recommend using the Cost Summary feature with all the suppliers you source, but only with at most with the top three suppliers.

Creating a Cost Summary

Start by navigating to the **Suppliers & Responses** page of the RFP and click on the venue you would like to build a summary for. Click on the **Cost Summary** tab.

If you have not started creating the Cost Summary, you will have the option to import costs or start adding them individually. The easiest way to begin is to click **Import Proposal Cost Items**, which will take the costs from your proposal and create a line item for each.

Import Proposal Cost Items
Save items from your proposal to the Cost Summary.
Import

Add Cost Items
Create and save an individual item to the Cost Summary.
Add

Upon importing, choose which Snapshot to import the cost items into. Each Snapshot represents a different moment in the lifecycle of the meeting. Common Snapshots we see are Budgeted, Initial/Proposed, Negotiated, Contracted and Actualized. The specific Snapshot names are configured by your account administrator and may differ slightly in your own account. In the Estimated Costs and Sleeping Room Costs sections, deselect any items you do not wish to import and edit any amounts if needed. Click **Save and Add**.

Response Information **Cost Summary**

| Cost Items | Budgeted | Negotiated | Proposed | Contracted | Actualized | Proposed - Contracted |
|-------------------------|----------|------------|-------------------|------------|------------|-----------------------|
| Accommodation | | | 108,078.00 | | | |
| Double | | | 0.00 | | | |
| Run Of House | | | 104,328.00 | | | |
| Single | | | 0.00 | | | |
| Staff | | | 1,250.00 | | | |
| Suite | | | 2,500.00 | | | |
| Total Event Cost | | | 108,078.00 | | | |

Note: All rates are displayed in GBP

Want this summary to represent the costs of this event? If so, these costs items will be used in reports and synced with your default RFP budget.

Use Cost Summary

Once you have either imported or added your cost items, click **Close** to return to the Cost Summary tab. You can add items from your proposal by clicking **Add Item** at the top of the screen or import cost items from a newer version of your proposal by clicking **Import Proposal Costs**.

Click any individual item and choose **Edit** to add additional detail or numbers for additional columns to reflect your updated numbers at that stage of the lifecycle. For example, if you have negotiated a lower rate on a room, click on the line item and add the lower negotiated cost into the appropriate column. When you click **Close** to return to the overall Cost Summary, you will find the changes reflected in the total negotiated meeting cost.

To the right of the snapshot, you may find a formula that automatically calculates savings or the differences between two columns. These are configured by your account administrator and reflect the way your company tracks savings.

| Cost Items | Budgeted | First Offer | Negotiated | Contracted | Actual | Budgeted - Actual | First Offer - Contracted |
|--|-----------|-------------|------------|------------|-----------|-------------------|--------------------------|
| Food & Beverage | 2,640.00 | 1,980.00 | 1,650.00 | 1,650.00 | 1,637.50 | 982.50 | 327.50 |
| Breakfast - Buffet  | 2,640.00 | 1,980.00 | 1,650.00 | 1,650.00 | 1,637.50 | 982.50 | 327.50 |
| Hotel | 19,500.00 | 19,500.00 | 17,310.00 | 17,310.00 | 17,260.00 | 2,140.00 | 2,140.00 |
| Run Of House  | 18,900.00 | 18,900.00 | 17,010.00 | 17,010.00 | 17,010.00 | 1,890.00 | 1,890.00 |
| Staff  | 600.00 | 600.00 | 300.00 | 300.00 | 250.00 | 250.00 | 250.00 |

Award the business

Awarding the RFP and notifying suppliers who did not win the business

After reviewing the proposals from suppliers, the next step in most cases is to award your business to the supplier whose proposal best meets your requirements. You should also let the remaining suppliers know they did not win the business this time.

Awarding an RFP can be completed on the **RFP Administration** page, on the **Supplier & Responses** page or via the **Actions** dropdown when viewing an individual supplier proposal. From any of these locations, click **Award RFP** to initiate the award wizard.

Step 1: Check the boxes next to the winning suppliers preferred or alternate dates. Then click **Next**. While the business is often awarded to a single supplier, you can award an RFP to multiple suppliers if the needs of your event require you to do so.


| South Pole | | | |
|--|-----------|--------------|-------------------------------------|
| | Date Type | Availability | Event Dates |
| ABU DHABI SATURDAY Antarctica, Antarctica | | | |
| Submitted Proposal | | | |
| <input checked="" type="checkbox"/> | Preferred | 1st Option | Mon, Apr 24 2023 - Wed, Apr 26 2023 |
| Ice Cap Inn South Pole, Antarctica | | | |
| Submitted Proposal | | | |
| <input type="checkbox"/> | Preferred | 2nd Option | Mon, Apr 24 2023 - Wed, Apr 26 2023 |

If you ultimately award the business to a supplier who was not sent the RFP, you can also add them at this point by clicking **Add Supplier** at the bottom of the list. This supplier will not be sent the RFP, but you can still track that you used them for this event. You will be asked to search for the supplier to include it on the list.

Step 2: Confirm the number of attendees and rooms and click **Next**. The table automatically populates with the details of the RFP response. In most cases, this detail will be accurate; however, if you have engaged in offline negotiations with the supplier regarding rate or number of rooms, you can update the values here for more accurate reporting.

| Step 2: Awarded Information | | | | | |
|---|-----------|----------------------------|------|-----------------|----------------|
| Enter the number of attendees and sleeping rooms for each supplier. | | | | | |
| Event Dates | | Average Sleeping Room Rate | | Total Attendees | Single (1 Bed) |
| Original RFP | | | | | |
| Mon, Apr 24 2023 - Wed, Apr 26 2023 | | | | 40 | 100 |
| ABU DHABI SATURDAY Antartica, Antarctica | | | | | |
| Start Date: | End Date: | | | | |
| 4/24/2023 | 4/26/2023 | 100.0 | Euro | 40 | 100 |
| Totals | | | | 40 | 100 |

Step 3: Notify the other suppliers who submitted proposals of why you are not awarding them the business. Select a reason for each supplier and add any additional comments using the notepad icon to the right. Click **Next**.

| Step 3: Decline Bids | | | |
|--|-------------|------------------------------------|---|
| Provide a reason for declining the following suppliers that have also submitted proposals. | | | |
| <input checked="" type="checkbox"/> | Supplier | Reason | Additional Comments |
| <input checked="" type="checkbox"/> | Ice Cap Inn | Food and Beverage Minimum Too High |  |

Step 4: Confirm that you are finished awarding this RFP and click **Confirm Awarded Suppliers**.

Use the options below to:

- Indicate that you are finished awarding. Suppliers will no longer be able to add or submit further responses and the RFP will be closed on their end. This saves them the work of responding to an awarded RFP and prevents you from having to administer additional responses.

- Optionally let the remaining suppliers know which supplier was ultimately awarded.

Step 4: Confirm Awarded Suppliers.

| Name | Key Contact Last Name | Key Contact First Name | Email Address | Sleeping Room Rate | Note |
|--------------------|-----------------------|------------------------|-----------------------|--------------------|------|
| ABU DHABI SATURDAY | Greetham | Gabby | lrobison123@cvent.com | EUR 100.00 | |

☒ I am finished awarding. Suppliers may no longer edit or submit responses to this RFP.
☐ Share the awarded **supplier name** and **metro area** with other suppliers included in the RFP. No additional information, including rates or key contacts will be shared or visible.

At this point, the awarded supplier(s) will show a proposal status of Awarded. Those whose bids were not accepted will show a status of Declined. The RFP status will also change to Awarded.

Adding detailed awarded and contracted details

Sending an RFP is a great way to find the best deal for your event. Many planners also contact the suppliers that send the most interesting proposals to negotiate even better pricing or conditions. You can add this information in Cvent to track those hard-won savings and report on them. In fact, you already started doing so at a high level in step 2 of the RFP award wizard.

After you award an RFP, you will be prompted to add Awarded & Contracted Details. If you decide not to update those details immediately, a new **Awarded & Contracted Details** tab appears under the section links on the left. Click in to see a list of the awarded suppliers. Then, click on the supplier name to display a summary of the contract details.

To modify any of the information displayed here, click **Edit**. Common edits include:

- Marking **Contracted?** to Yes to track that the contract with the supplier has been signed.
- Tracking specific negotiated room rates by room type.
- Documenting specifically agreed-upon commission rates.
- Uploading a copy of the contract as an attachment.

Contracted? ☒ Yes ☐ No

Event Start Date: 4/24/2023

End Date: 4/26/2023

Total Attendees: 40

Additional Information:

2,500 characters remaining

Sleeping Room Information

| | Room Type | Quantity | Rate |
|--------------------------|-----------|----------|------|
| <input type="checkbox"/> | Single | 95 | 150 |
| <input type="checkbox"/> | Double | 5 | 175 |
| <input type="checkbox"/> | Staff | 2 | 0 |

Delete Add Row

Cancel an existing RFP

Sometimes the unexpected happens, and your event needs to be cancelled. If you find yourself in this situation, you will need to notify all suppliers associated to your RFP. To do this, click into your RFP and navigate to the **RFP Administration** page on the left under section links.

Click **Cancel RFP**. You will be asked to select a reason, such as event postponed, and may provide additional comments. Your reason and comments will be communicated to the suppliers who were sent the RFP. When ready, click **Confirm Cancel RFP**.

| | | | |
|--|----------------------------|--------------------------------|-----------------------------|
| Award RFP Cancel RFP Actions ▼ | | | |
| RFP Status | Visibility Settings | Portal Publisher | Cost Summary Mapping |
| Current RFP Status: Active View Status History View Send History | | | |
| RFP Milestones | | | |
| RFP Name: Portal Demo Test Event | | RFP Code: GHNXBKFJVG3 | |
| RFP Type: Meeting Space and Sleeping Rooms | | | |
| Decision Date: 02-Apr-2021 | | Response Due Date: 01-Apr-2021 | |

Important note: Once your RFP has been cancelled, it cannot be reactivated. If you decide you need an RFP for this event after all, you must create a new RFP or copy the cancelled version.

Additional Recommended Resources

- [Understanding RFP and Proposal Statuses](#)
- [Awarding an RFP](#)
- [Comparing Bids](#)
- [Editing and Resending an RFP](#)
- [Viewing, Commenting on, and Printing Proposals](#)
- [Emailing People Related to an RFP or Proposal](#)
- [Cancelling an RFP](#)
- [Retracting an Awarded or Declined Proposal](#)
- [Declining Proposals](#)
- [How do I retract a cancelled RFP?](#)
- [Creating a Cost Summary](#)
- [Configuring Budget Settings](#)
- [Adding Contracted Rates](#)

ADDITIONAL FEATURES

Add your personal industry contacts (NSOs) and include them on the RFP

Regular meeting planners often have personal contacts with the suppliers in the industry: contacts at a chain's national sales office (NSO) or regional office, specific contacts for supplier brands and direct contacts at specific properties. Set these contacts up in Cvent to copy them on your RFPs. They can help you when you are unsure of the best venue for your event and serve as advocates to help ensure the best possible response for your RFP. *Note: Though not all personal industry contacts necessarily work in national sales offices, they are all set up as NSOs in Cvent.*

You can view contacts already created by going navigating to **Preferred** in the top navigation bar and choosing **NSO Contacts** on the left.

Adding a new NSO contact

To add a new contact, click **Add**. Add the contact's first name, last name and email address. Include additional information in the remaining fields as needed.

Best practice: Use the Short Description field to indicate when you should include this contact on an RFP. You will see this description when sending the RFP. This can help you remember when to select or deselect the contact.

Step 1: Enter Contact Information

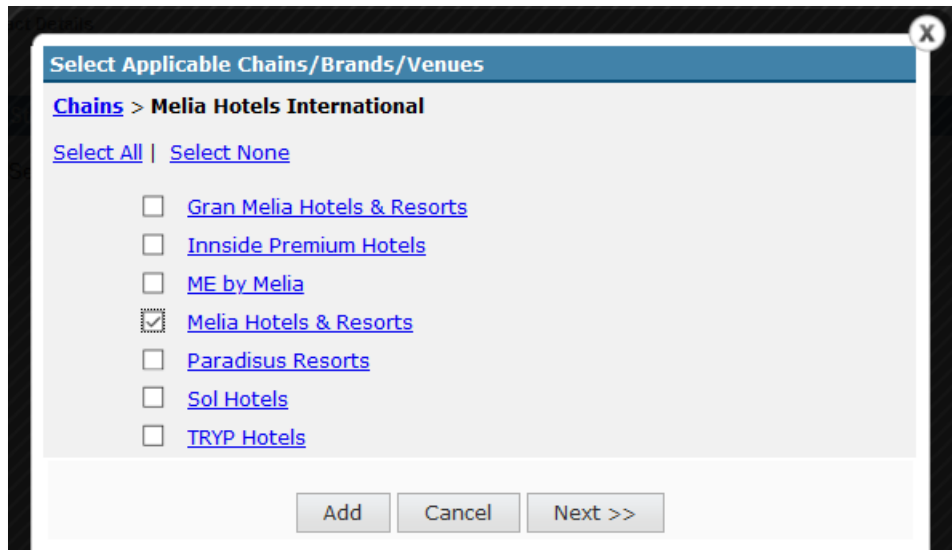
| | | | |
|--------------------|---|----------------|---|
| First Name: | <input type="text" value="John"/> | Last Name: | <input type="text" value="Smith"/> |
| Phone: | <input type="text" value="+1 701-123-4567"/> | Email Address: | <input type="text" value="johnsmith@hotelchain.com"/> |
| Title: | <input type="text" value="NSO"/> | Fax Number: | <input type="text"/> |
| Short Description: | <input type="text" value="RFPs with 100+ room nights"/> ? | | |

Public or private? By default, only you will have access to this contact. Click the radio button next to "Public" if all other users of your account should also be able to see it.

Click **Next**. In Step 2, you will associate this contact to a specific chain, brand or supplier. When you send an RFP, Cvent will automatically suggest this contact as a potential recipient when including the associated supplier or a venue from that chain or brand.

To associate this NSO to the properties they represent, click **Add**. When the pop-up appears, check the boxes beside the appropriate chain and click **Next** to see the affiliated brands.

Continue the search to reach any individual property. Click **Add** at any point in the search to set the NSO as a contact for the selected chain, brand or property. To find CVBs and independent properties, choose **Independent / Other** as the chain and **CVBs, Independent or Other Affiliation** as the brand. Finish by clicking **Finish**.



To edit an NSO, click onto its name in the list and make any of the modifications listed above.

Defaulting an NSO contact for inclusion in all RFPs

If you plan on copying the NSO every time you send an RFP to the property, you can save time by making them the default NSO contact. When a contact is defaulted, they are automatically selected as a recipient when sending an RFP. When not defaulted, the planner must actively select their name when sending the RFP. Defaulted contacts may be deselected on an individual RFP if needed.

There are two options for setting defaults:

- **Set Default** - Automatically selects the NSO for all RFPs you send
- **Set Account Default** - Automatically selects the NSO for all RFPs sent by all users in your Cvent account; this action may be restricted to your account administrator.

Choose the desired option, **Set Default** or **Set Account Default**, from the **Actions** dropdown, and check the boxes next to the NSOs you want added automatically to every RFP sent. Click **Save** to finish. The defaulting setting are displayed on your master NSO list.

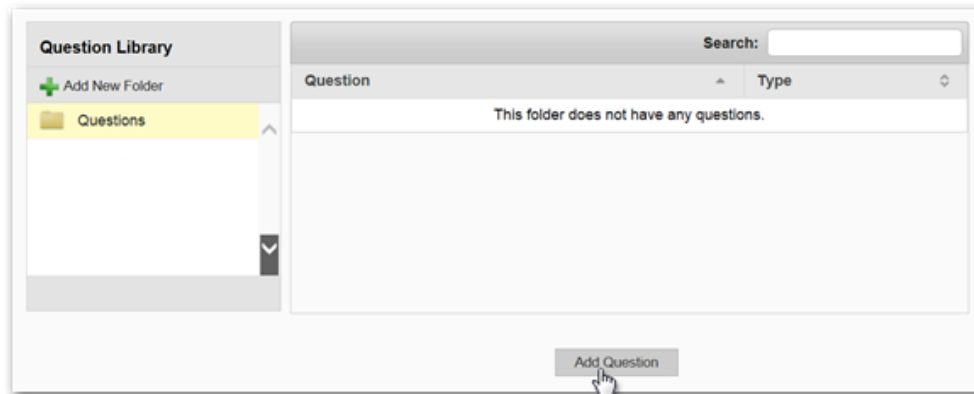
Create questions and add them to your RFPs

Custom questions allow you to personalize your RFP and solicit extra information specific to your needs and requirements. These can be created on the fly when creating an individual RFP. You can also create and store questions in a question library to reuse them easily.

Navigate to **Preferred** in the top navigation bar and then click **Custom Questions** in the section links at the left. There, you will see at least two folders:

- **Default Questions** - Questions that will automatically be added to every RFP you create. You can always delete them from an individual RFP before you send it.
- **Questions** - A folder for questions that you will use sometimes.

If you plan to create a lot of questions, add new folders with the **Add New Folder** button to organize them in logical groups.



Creating the question itself is simple. Choose the desired folder and click the **Add Question** button. Add the questions details just as you would for an on-the-fly question on the RFP. The exact options per question will vary depending on the question type selected.

Set **Is this question required?** to Yes if you would like to guarantee a response from the supplier. When required, the supplier must answer your question to continue and submit the RFP. When set to No, the question becomes optional.

To edit or delete an existing question, click the arrow icon to the right of the question name and choose the **Edit Question** or **Delete Question** option. When editing a question, you can change any of the question details, including the folder it is in and whether it is required.

Once you have added your questions, make sure they appear in a logical order. This is especially important for your default questions, which are added automatically. To set the order of the questions in any folder, select that folder and then click the **Set Order** button. Next to each question, enter numbers to order them numerically. Any numbers work provided the numbers come sequentially in your desired order (e.g., 1 - 2 - 3, 4 - 15 - 30, etc.).

| Order | Question Text | Question Type |
|--|---|------------------------------------|
| 10 | Do you agree to our standard terms and conditions? | Choice - Single Answer (Drop-Down) |
| 20 | Will any industry competitors be hosting an event at your venue over the same date? | Choice - Single Answer (Drop-Down) |
| <div> <div>Save</div> <div>Cancel</div> </div> | | |

Add different organizational profiles to report on volume by clients or business units

An organizational profile on an RFP shares details with the supplier about the organization of the meeting or event. Having the profile created in advance saves you time typing when you create each RFP. You can also create different profiles for different sub-organizations, clients you source on behalf of or departments at your company. You can then report on them to see different RFP data by sub-organization, client or department.

Managing profiles is easy. Start by clicking on **Organizations** in the top navigation bar. The system will display a list of any organization that has already been set up. Click on the name to view the details and edit the entry.

[Overview](#) [Manage RFPs](#) [Manage RFIs](#) [Preferred](#) [Cancelled Space](#) **Organizations** [Reports](#) [Reports \(New\)](#) [Find Venues](#)

[Organizations](#) > [Organization Profile](#)

| Actions | Organization Profile ▲ | Default | Address 1 | City |
|---------|--------------------------------|-------------------------------------|-----------------------|---------------|
| | ABC Media Inc. | <input checked="" type="checkbox"/> | 1834 Wake Forest Road | Winston-Salem |
| | Bakers Association | <input type="checkbox"/> | 1200 Bakers Lane | Mountainview |
| | Georgetown Cupcakes | <input type="checkbox"/> | 1834 Georgetown Blvd. | Washington |
| | Girl Scouts of the USA | <input type="checkbox"/> | 420 Fifth Avenue | New York |
| | National Realtor's Association | <input type="checkbox"/> | 1203 Robinhood Lane | Bridgetown |

Display results per page

Add

To add a new one, click the **Add** button and enter the requested details. Only the organization name, type, address and city are required; however, the more detail you provide, the better suppliers will know how to support you.

Organization Profile Details

Organization:

Default: ☒

Organization Type:

Industry:

Address 1:

What You See

What They See

Organization Information

| | | | |
|--------------------------|---|---------------------------------|-----------------|
| Organization Name | Parrot Paper Company | Organization Type | Corporate |
| Address | 829 Parrott Boulevard Key West, FL 22102 USA | Avg. Attendees / Event | 20,001+ |
| Employees | 151 - 300 | Avg. Room Nights / Event | 10,001 - 20,000 |
| Events / Year | 150 | Total Attendees / Year | 2,001 - 5,000 |
| Single-day Events | 30% | Total Room Nights / Year | 501 - 1,000 |
| Multi-day Events | 80% | | |

By default, you will have the option to create one organization profile. If you have an Enterprise license, you can create multiple organization profiles.

Once you are done, click **Save**, or **Save and Add** to create another. When you are creating an Advanced RFP, you can switch between different organizational profiles by clicking the ellipsis (...) in the Organization field in Step 3 of the RFP Wizard. When the pop-up appears, click Select beside the profile you want to use.

Additional Recommended Resources

- [Adding NSO Contacts](#)
- [Importing and Exporting NSO Contacts](#)
- [Storing Occasional RFP Questions](#)
- [Deleting Questions from Your RFP or Account](#)
- [Creating Default Questions for RFPs](#)
- [Adding an Organizational Profile](#)

ACCOUNT-WIDE REPORTING

Generate cross-RFP reporting to report on key organizational metrics

You can not only run reports specific to a given RFP but also report on multiple RFPs at the same time. This is helpful when you want to look at overall activity in your account and identify trends. You can find this under **Reports (New)** on the navigation bar.

| General Reports | |
|--|---------------------------------|
| Request for Proposals (RFPs) | ⓘ Run |
| RFP Lifecycle | ⓘ Run |
| RFPs and Suppliers Show Report Presets ▼ | ⓘ Run |
| Spending and Savings | ⓘ Run |

Key reports to run include:

- **Spending and Savings**
This will help you report on spend and savings per event based on the Cost Summary. This report includes spend per category/subcategory based on the selected snapshot or savings per category/subcategory based on the selected savings formula. By default, the report includes key details on the RFP, supplier and cost summary.
- **RFPs & Suppliers**
This contains a graphical and tabular presentation of your RFPs and received proposals within a specified date range. This report gives detailed information about different parameters of your RFPs and proposals such as key details on supplier, RFP and proposal counts, averages, totals, budgets, etc.
- **Request for Proposals (RFPs)**
This reports on your RFPs within a specific date range. This report includes the event date, meeting space with accommodations and RFP status along with other key details. This report does not include proposal information.

Analyze trends in responses from suppliers

You can easily extract information on the most common reasons why your RFPs were turned down by running the RFP & Suppliers report and adding a field called Response Comment. It will pull up comments for all proposal statuses but is most useful when looking at turndowns. Add in additional details like chain or country to further analyze the data.

Report on the RFP lifecycle

The RFP Lifecycle report can further help you get a holistic view of the account by summarizing key metrics such as lead time, average number of suppliers sourced, and total number of RFPs created and awarded.

Tip: The reporting module is quite intuitive to use and is best learned by doing. In preparation for the certification, we recommend you enter your account and run these reports to familiarize yourself with the process and their contents.

Additional Recommended Resources

- [Running New Account-Wide Reports](#)

THE SUPPLIER PERSPECTIVE

Understanding the supplier's perspective is key to truly understanding the full lifecycle of the Cvent Supplier Network.

Understanding venue profiles

To start, it is important to understand how venues build their profile listings and position themselves on the network. Profile content is managed by property users. Cvent helps suppliers get started and builds out an initial basic profile. After this initial listing is created, the suppliers then manage their listings and are responsible for ensuring that they contain the most accurate information possible.

Details that a supplier can add to their venue profiles include but are not limited to:

- Venue ratings
- Total meeting space and number of guest rooms

Venue Ratings

Cvent provides a direct integration with Northstar Travel Media to keep these ratings up to date. Other ratings such as AAA and Forbes Travel Guide can be self-reported by the venue. Northstar ratings are displayed as the primary rating by default; however, individual venues can choose to update the default rating based on what most accurately represents their venue. You can find the rating of the venue in their profile and further use this as a search filter.

The screenshot displays the profile page for the Corinthia Hotel London. At the top, there is a link to 'Back to London, UK venues'. The hotel name 'Corinthia Hotel London' is prominently displayed, followed by the description 'London Luxury hotel'. Below this is a navigation bar with tabs for 'Overview', 'Photo Gallery', 'Meeting Space', 'Guest rooms', and 'Nearby'. The 'Overview' tab is selected. Under the 'Need dates' section, the date range '04/09/2020 - 05/31/2020' is shown with a 'Show all' button. A red box highlights the 'Ratings' section, which includes three ratings: 'AA Hotel Services' with a 5-star rating, 'Forbes Travel Guide' with a 4-star rating, and 'Northstar' with a 5-star rating. Below the ratings, the 'Awards' section features a 'cvent TOP MEETING HOTELS 2019' badge.

< Back to London, UK venues

Corinthia Hotel London

London Luxury hotel

Overview Photo Gallery Meeting Space Guest rooms Nearby

Need dates

04/09/2020 - 05/31/2020

Show all

Ratings

AA Hotel Services ⓘ 5★

Forbes Travel Guide ⓘ 4★

Northstar ⓘ 5★

Awards

cvent TOP MEETING HOTELS 2019

Meeting space

Suppliers can further include meeting space details, such as images, floor plans and capacity charts, on their listings. Suppliers typically list breakout options as individual spaces to give you a complete picture of how the space can be configured for different groups.

Venues using Social Tables have more flexibility to display different room setup options and the others are encouraged to upload floor plan collateral as additional material links.

How suppliers receive RFPs

Venue sourcing in Cvent is a blind bidding process for suppliers. Suppliers only respond to RFPs that have been sent to them directly or that they have pulled from the RFP Showcase.

Every venue has at least one lead catcher to receive its RFPs. A lead catcher can be a specific sales manager at the venue or a general email address that is managed by many people. You may also see that the lead catcher can be listed as “external software”; this means that the property has an integration to their own internal system, which they use to manage leads.

When an RFP is sent, the lead catcher receives an email providing them with the basic details of the request and a few immediate actions they can take.

The image is a screenshot of an email notification from Cvent. At the top, the Cvent logo is displayed in a white box. Below the logo, the main heading reads "New request for proposal (RFP) from CVENT!". A horizontal line separates the heading from the event dates, which are "Sat, Sep 17, 2022 - Sun, Sep 18, 2022 (Not flexible)". A note below the dates states: "Note: To see a complete list of the event dates, go to the RFP information section below." The body of the email is in a white box and begins with the name "Lexi Pettigrew," followed by a paragraph: "Shefali Dewett sent the Certification Test RFP to Sunny Town Convention & Visitors Bureau on behalf of Bakers Association through the Cvent Supplier Network. To view this RFP, click **Respond to RFP**. If you need help logging in, contact one of the Admins listed below. If you need help responding to this RFP, check out your [response options](#)." Below this paragraph, a smaller line of text says: "Cvent doesn't charge commission or transaction fees and there is no commission associated with this RFP from the planner." At the bottom of the email, there is a prominent green button with the text "Respond to RFP" in white.

cvent

New request for proposal (RFP) from CVENT!

Sat, Sep 17, 2022 - Sun, Sep 18, 2022 (Not flexible)

Note: To see a complete list of the event dates, go to the RFP information section below.

Lexi Pettigrew,
Shefali Dewett sent the Certification Test RFP to Sunny Town Convention & Visitors Bureau on behalf of Bakers Association through the Cvent Supplier Network. To view this RFP, click **Respond to RFP**. If you need help logging in, contact one of the Admins listed below. If you need help responding to this RFP, check out your [response options](#).

Cvent doesn't charge commission or transaction fees and there is no commission associated with this RFP from the planner.

Respond to RFP

After receiving an RFP, the supplier's lead catcher can:

- Assign it to someone else at the venue
- Forward it (if allowed by the planner)
- Download a PDF version of the RFP
- View the RFP name, dates, key contact, number of attendees and response due date

Upon viewing the RFP, the supplier can take appropriate actions including:

- Mark in progress
- Turn down
- Retract a turndown
- Review the requirements

CVBs and NSOs have additional options:

- CVBs - Confirm receipt to acknowledge they have received the request
- NSO/preferred contact - Forward the RFP (if allowed) to the right venues
- NSO/preferred contact - Change the NSO contact if appropriate. They also have an option to notify the planner in the event of an NSO addition or change.
- These contacts can also change the National Sales Office contact, if needed.

How suppliers create proposals

The venues follow a wizard (much like the RFP creation wizard) to create and submit proposals.

- If there is a requested commission, properties can propose commission rates and note what the proposed commission rates are applicable to (e.g., guest rooms, F&B, etc.).
- For the event dates, if the RFP's dates were marked as flexible, suppliers can propose up to one unique date of their own. Otherwise, properties can bid on the planner's preferred and/or alternate dates.
- Suppliers can either submit package or itemized pricing. If properties choose to respond with package pricing, they are required to provide the price per person per day and can note what is included in the package(s). Partial bids can also be submitted.
- In the sleeping room grid, suppliers will provide the room rate along with the quantity they can offer and indicate if the sleeping room requirements are completely met.
- For any meeting space details, the suppliers can populate the details of the meeting room they would provide based on the number of attendees, configuration and what you intend to do in that space.
- Once the required RFP details are filled out, they can include a proposal key contact

who will be kept in the loop for any RFP updates. If a CVB was included on the RFP, venues have the option to keep the CVB included on the response. This requires a proactive opt-in and is not defaulted by the system.

After the proposal is submitted, the venues have a few options such as:

- Withdrawing the proposal
- Editing/resubmitting the proposal
- Self-awarding: This option is meant for situations when a planner has been in contact with the supplier (e.g., by phone or email) and has confirmed they will move forward with the event at the supplier's venue but still has not closed out the RFP in Cvent. This option allows suppliers to send a gentle reminder to the planner to close out the RFP.
- Viewing their proposal in the "View Bids" report. Just as you can compare proposals in a side-by-side view, suppliers can view their own proposal in the same format.

SAMPLE QUESTIONS

The questions below are designed to be like questions you will see on the exam so that you can become familiar with how the questions will appear. These questions are intended only to serve as an example and are not a comprehensive review of all possible material.

1. Which of the following best defines the Turned Down status?

- a. The supplier has sent the RFP to a CVB.
- b. The supplier has sent the RFP to sister venues.
- c. The supplier has sent the proposal.
- d. The supplier is unable to accommodate your request.

2. How do you reject a bid when you have received a proposal that does not meet your needs, but you are not ready to award the RFP overall?

- a. Use the Decline Bid action on the Supplier & Responses page.
- b. Proposals can only be declined during the Award Wizard.
- c. Delete the supplier from the RFP.
- d. Use the Send Message feature from the Suppliers & Responses page.

3. What does Decision Due Date refer to?

- a. The date that the planner expects to award the business.
- b. The date supplier responses are due for this RFP.
- c. The start date of the event.
- d. The first date that sleeping rooms are required.

4. How can you best ensure that your NSO contact is included on all RFP sent from your account to a venue in their chain?

- a. Add the NSO contact and make it a user default.
- b. Add the NSO contact and make it an account default.
- c. Add the NSO contact and make it public.
- d. Share the contact details with the other users so they can add it on every RFP.

5. What determines the default star rating for suppliers on the Cvent Supplier Network?

- a. Cvent integrates with Northstar Travel Media and displays the Northstar rating as a default.
- b. The supplier can add star ratings and select the default for their listing.
- c. Cvent displays the star rating by the venue's national regulator as the default.
- d. Suppliers update their listed information when responding to RFPs as part of the response process.

SAMPLE ANSWERS

1. D – The supplier is unable to accommodate your request.

The proposal statuses communicate information about whether the supplier has sent a proposal and actions that have been taken on this proposal. Turned Down is an indication by the supplier that it cannot accommodate the business.

Related Objective: Manage Responses and Act on RFPs

2. A – Use the Decline Bid action on the Supplier & Responses page.

Planners frequently decline unselected proposals during step 3 of the Award Wizard, when you can assign a decline reason for each unselected supplier. That said, you can also take several actions on proposals on the Suppliers & Responses page, including the ability to decline an individual bid. This is a common practice when creating a shortlist of suppliers.

Related Objective: Manage Responses and Act on RFPs

3. A – The date that the planner expects to award the business

The decision due date is the date the planner expects to award the RFP to venue(s). The planner begins by reviewing and comparing the responses which helps her decide on where to award the business for this event. It differs from the event start date, which is typically much further in the future.

Related Objective: Create and Review RFP

4. B – Add the NSO contact and make it an account default.

National Sales Office or NSO contacts can be added on the Send RFP Confirmation page; however, if you would like to copy a contact by default for all RFPs in an account, make them an account default.

Related Objective: Searching the Supplier Network and Sending the RFP

5. B – The supplier can add star ratings and select the default for their listing.

While Cvent does integrate with Northstar Travel Media for star rating data, individual venues can self-report other star ratings that apply, including locally used star ratings and other common ratings, such as AAA and Forbes Travel Guide. The individual supplier determines which one is the most relevant and is displayed by default.

Related Objective: The Supplier Perspective