

How to Create a Killer RFP



Part 2 of our series:

Choosing a Marketing and Media Relations Agency

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In a previous article, we offered you [10 Strategies for Choosing a Marketing and Media Relations Agency](#). Another strategy for significantly improving your chances of finding the right agency for your needs is to issue a formal Request for Proposal (RFP)—inviting agencies to submit a proposal for your business.

An RFP enables you to ask questions about each agency's skill sets, areas of expertise, demonstrable successes, etc. It also allows you to outline your goals and objectives so that each agency knows exactly what your needs and expectations are. If you ask the right questions, an RFP can give you deep insights into each agency's style, creativity, writing capabilities and collaborative approach—all of which are crucial to your ability to select the right agency.

STEP 1 IDENTIFY YOUR GOALS

One of the keys to creating a successful RFP is to clearly state your organization's goals—in other words, why you're interested in engaging an agency in the first place. Consider making this the initial section of your RFP; you might even title the section *Goals for this Engagement*.

GOALS CAN INCLUDE STATEMENTS SUCH AS:

- To generate new leads through aggressive marketing campaigns that incorporate traditional print materials, electronic materials and social media initiatives.
- To raise our profile with the media and our key audiences through a comprehensive media relations campaign to national and local news outlets, the business press, and major industry publications.
- To update our key messages based upon emerging marketplace opportunities that we wish to leverage in the next two quarters.

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The more thorough and specific you are about the scope of the engagement, the more thorough and specific the participating agencies' responses will be.



- To raise our brand visibility and social media presence by launching a Facebook page and gaining Twitter followers.

Delineating your goals is the first step toward ensuring that the RFP process reveals which agencies are truly right for your organization. Also consider “weighting” your goals so that participating agencies know which goals are of greatest importance and how much time and effort they might need to devote to each goal. You can do this easily by stating something like, “We expect the winning agency to devote 25% of its allotted monthly hours to achieving this goal.”

STEP 2 SPECIFY THE SCOPE OF THE ENGAGEMENT

Once you’ve provided the overarching goals for the engagement, explain exactly what you want the winning agency to deliver. Be as specific as possible. If, for example, one of your goals is to launch an industry-focused PR campaign, identify the number of press releases you’ll want written, how often you’ll want these releases written and distributed, whether you already have media lists or want the agency to create lists for you, etc.

The more thorough and specific you are about the scope of the engagement, the more thorough and specific the participating agencies’ responses will be. Examples of scope-of-engagement statements might include:

- Write and distribute one press release per month that is search engine optimized. Each release will be distributed on or before the 15th of the month and will be sent to our national, local and industry media lists.
- Develop a strategic marketing plan to generate new inbound leads. The plan will specify the channels to be used, the materials to be created, and the outcomes that will be achieved.
- Revise the main landing pages of our website by incorporating new key messages, adding new content and updating the design of the pages.

STEP 3 SPECIFY THE TIMEFRAME

Even though you might share timeframes or dates in various other parts of the RFP, be sure to spell out the overall length of the engagement, key milestone dates and the dates of all important deliverables (if you know them). Aggressive timeframes can impact pricing, and being clear about deadlines is something that every agency will appreciate.



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STEP 4 CONSIDER IDENTIFYING A BUDGET RANGE

While many companies prefer not to mention budgetary issues in their RFPs, doing so can actually work to your advantage. By openly stating your preferred budget range, for example, you give agencies the opportunity to provide you with customized or more focused packages of services. This can open the door to high-quality agencies you might assume are beyond your price range.

You don't need a huge agency to get scalability, but you do need one with "bench strength"—the resources and talent in reserve to meet your potential future needs. Also bench strength is crucial if you have trouble working with a particular person on your agency team.

STEP 5 INCORPORATE THESE ESSENTIAL REQUESTS

As noted above, an RFP gives you the opportunity to ask questions and request information and materials that will help you decide whether an agency is really suited to your needs.

Following are a number of requests—by category—which you should consider incorporating into your RFP. We've written them so that you can use them as they are, but don't miss an opportunity to tailor them when you can.

SAMPLES OF WORK

- Provide samples of your PR materials, marketing materials and other content that you feel is relevant to this engagement.

CASE STUDIES

- Provide a few case studies that highlight your success in serving clients with needs similar to ours. Case studies should focus on specific challenges and goals of your client work as well as the outcomes/results.

AGENCY BACKGROUND/PROFILE

- Provide a brief overview of your agency including its history, number of years in business, main areas of expertise/focus, etc.
- Identify your agency's key differentiators or strengths.
- Identify your particular expertise in specific PR/marketing tactics, channels and strategies.



Are you willing to ramp up or scale back this team if our needs should change?

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- Does your agency have expertise in social media? Do you have a social presence of your own?
- Do you have expertise in particular PR/marketing hardware and software? If so, please identify. And have you developed hardware or software of your own?
- Describe two or three situations in which your agency had to make significant adjustments in its efforts based on a client's changing needs or priorities.
- Provide a list of key clients, making certain to highlight clients within our industry.

REFERENCES

- Provide three references from current clients (including reference contact information).

LIST OF RELATIONSHIPS

- Provide a list of relationships you currently maintain within our industry/target markets (e.g., national and local media, trade press, analysts, professional bloggers, recognized subject matter experts, etc.)

PROPOSED TEAM

- Please provide information about the team members who would be assigned to this account (e.g., names and titles, biographical sketches, past experience similar to this account, etc.).
- Are you willing to ramp up or scale back this team if our needs should change? How quickly? How will costs be adjusted?

MILESTONES AND MEASUREMENTS

- What action items will be completed during the first month of the engagement? During the second month? During the third?
- How will you measure the success of this engagement?
- How will you report on activities, milestones and accomplishments? How often will we receive these reports?
- Please identify any potential "additional fees" that may occur?

NOW... ARE YOU TRULY RFP READY?

Follow the suggestions above and you'll be well on your way to crafting a killer RFP. But keep this in mind: the RFP process isn't for everyone. To be worthwhile an RFP requires a serious investment of time and effort on your part. In addition

Are you prepared to give your agency the information, time and attention it needs to meet your goals?



to composing the RFP document itself, you will have to spend time carefully reading through the responses you receive, comparing and contrasting the respondents, and then getting consensus from all of the key stakeholders to reach your final decision.

In addition, you should be prepared to allow at least one round of supplementary questions from the agencies participating in your RFP process—questions that you will then have to answer. Very typically, agencies will have specific questions related to your goals and expectations once they've read through your RFP. Answering as many of these questions as you can is in the best interest of both parties. First, it will help the agencies understand your needs and explain their services, style and approach more thoroughly. And, second, it will make you more certain about your evaluation of each agency and whether it can meet your needs.

If you're a small organization or feel that you don't have the time and resources to conduct a formal Request for Proposal, be sure to read our previous article, [**10 Strategies for Choosing a Marketing and PR Agency**](#). It offers tips on how to go about searching for and selecting an agency that's right for you.

About Fisher Vista: Fisher Vista is a full-service marketing and communications agency specializing in the HR and benefits marketplace. Our decade of experience in this highly competitive industry means we provide immediate value by moving quickly from planning to executing compelling marketing, visibility and lead generation campaigns. Our proven track record of success in HR marketing is a result of our highly talented team members – many who have been with our firm for a decade – and the experience they've obtained by regularly interacting with HR professionals, press and other key influencers. Our team of marketing and PR professionals spans multiple disciplines including strategy, media and influencer relations, brand messaging, social media marketing, web and print design, advertising, market research, social analytics and more. This wide range of skills and expertise combined with our innovative technologies, including HRmarketer.com and SocialEars HR, ensures that our clients have access to best of breed resources to achieve their objectives.

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