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Social Media & Online PR RFP

Guidance and Templates

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Published 2010

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1. About Econsultancy

Econsultancy's reports, events, online resources and training help an international community of more than 85,000 digital marketers make better decisions, build business cases, find the best suppliers, look smart in meetings and accelerate their careers.

Econsultancy, which has offices in London and New York, is an [award-winning online publisher of reports](#) covering best practice, user experience benchmarking, market data, trends and innovation, and supplier selection. Econsultancy is an invaluable resource for internet professionals who want practical advice on all aspects of e-business.

Econsultancy also operates a highly popular [training](#) division, used by some of the world's most prominent brands for staff education, both in-house and via public courses. Econsultancy provides training across all areas of digital marketing and at all levels from one-day courses to an MSc in Digital Marketing.

In addition, Econsultancy hosts more than 100 [conferences and events](#) a year, including the Online Marketing Masterclasses, the annual Future of Digital Marketing conference, the Peer Summit, Roundtables, Briefings and a range of social events.

Econsultancy also runs the prestigious [Innovation Awards](#) where pioneering work carried out in the world of digital marketing and e-commerce is judged by an international panel of experts from companies themselves known for innovation.

The [Econsultancy.com](#) site now attracts 175,000 unique users per month where they access research, read the blog and take part in discussions in the forums. And as a portal to the digital marketing community, Econsultancy members can also link up with other members and digital suppliers through the directories, as well as find a new job or new digital talent using the job listings.

Some of Econsultancy's members include: Google, Yahoo, Dell, BBC, BT, Shell, Vodafone, Yell.com, Oxfam, Virgin Atlantic, Barclays, Carphone Warehouse, IPC Media, Deloitte, T-Mobile and Estée Lauder.

[Join Econsultancy](#) today to learn what's happening in digital marketing – and what works. Call us to find out more on +44 (0)20 7269 1450 (London) or +1 212 699 3626 (New York). You can also [contact us online](#).

1.1. About this guide

If you would like to know more about corporate membership and our roundtables or events then please contact us on +44 207 681 4053 or Peter.Abraham@Econsultancy.com.

If you have any comments or queries about this briefing then please contact Econsultancy's Research Director; Linus.Gregoriadis@Econsultancy.com

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2. Introduction

An RFP (Request For Proposal) is a document outlining the background to your objectives and a detailed list of business requirements for a given project. Typically, an RFP is sent to your likely group of suppliers/partners in order to solicit their proposals to work with you.

RFPs can be extremely valuable in optimising the chances that suppliers deliver the solutions that you need, encouraging the following:

- **Internal agreement:** allow you to discuss and finalise your requirements with all of the internal (and agency) stakeholders before involving a further supplier.
- **Accurate proposals:** allow suppliers to clearly understand your needs so they can provide you with the most accurate estimates of their best solution.
- **Comparable solutions:** ensure that each supplier receives the same set of requirements and therefore replies with a similar and comparable set of proposed solutions.

The purpose of this document is to outline some of the most important elements that might need to be considered by a client organisation when putting together a Request For Proposal to be submitted to a social media or online PR agency or company.

The factors considered here are by no means exhaustive, but equally, depending on circumstances, not all of these will always need to be considered.

Consider this document to be a starting point from which you can “pick and mix” elements to include in your RFP.

2.1. RFP Differences

Different Types of RFPs: Differences between an RFP, an RFI, an RFQ and an ITT

Although you may see these terms used interchangeably, they are decidedly different documents. Consider where you are in your process and what you want to achieve out of the exercise and then start by being accurate about what sort of document you are asking your potential suppliers to answer:

- **RFI (Request for Information)**
 - This document can simply be a fact sheet, often being used for initial planning purposes. In the case of small projects, this document can be used for decision making as well.

The rest of this document deals with the RFP only and outlines the section headings and some of the factors to consider, in the form of a template. Text is often for your consideration of how to structure the content of your questions – and should always be replaced with your own text.

3. Social Media & Online PR Template RFP

3.1. Summary

This gives you the chance to give the introduction and pre-amble to your RFP, distilling why you have put an RFP together and what you are intending to get from it.

3.2. Background

This is probably the most important section of the RFP, as it gives you the opportunity to set out the background to your company and the brief for what this RFP process is designed to achieve.

3.2.1. Company

Companies are perceived differently in the external market than they are internally. This first section enables you to reduce that difference and to describe the company to your suppliers in a way that sets the scene for the rest of the project brief.

It also means that your suppliers have no excuse for not understanding the significance of the company they are dealing with, nor the importance of social media or online PR to your overall business strategy – online and offline, historically and in the future.

3.2.2. Current situation

Depending on whether you are new to online activity, have lots of online experience but no commercial social media activity, or have already got an established program in place, this is where you can **describe your current situation** to your potential service providers.

- Are you currently active in this space and if so, to what extent?
 - Is this internal or externally managed?
 - Why are you looking to change service providers?
- The amount of internal resources you are willing to invest into social media and online PR

3.3. Project brief

This is the core of the RFP and should have been thought out thoroughly at the outset.

Separate sections for the Aims, Objectives and Strategy should ideally be outlined in this section,

Ideally it should highlight whether **market share, branding, customer engagement, reputation monitoring** or **increasing ROI or sales** is the primary requirement.

For example, a typical aim might be: “To provide a transparent customer service communication channel, in order to acquire, retain and support both current and potential customers.”

3.4. Response expectations and required timelines

This is the opportunity to be very prescriptive about how you want the suppliers to respond to your RFP and within what timescales.

3.4.1. Matrix questions

RFIs and RFQs often have a mainly quantitative element and ultimately can be analysed using a simple cost / benefit matrix.

As mentioned above, RFPs differ from RFIs and RFQs in that they give both sides the benefit of a deeper understanding of the requirement, allowing a qualitative response to be offered as a major part of the solution. Having said that, almost certainly you are going to want to be able to conduct some quantitative analysis of elements of the suppliers' responses as a part of your decision making process, so it is worth providing them with a version of the spreadsheet or matrix that you are going to use.

3.6 Detailed service questions

Now we get to the point where you can be very specific about what you want to get back from your suppliers. A series of detailed questions divided into headings can be seen below.

These are not always all required and equally others may need to be included for your own RFP, but these are some of the relevant questions to ask of your potential social media and online PR service suppliers.

3.6.5 Support and service

- What level of involvement (account, technical, training) can our company expect prior to the launch of any social media or online PR activity?
- What level of support (account, technical, training) can be expected after any activity has begun?
- What kind of things can you advise upon, initially and ongoing?
- What resources do you consider the minimum required from our company in order to run any effective social media activity?