

Preparing an RFP (request for proposal) to select a public relations agency

By Dave Groobert, General Manager, Environics Communications USA

Often the first step in selecting a public relations agency is distribution of a request for proposal (RFP), a formal document that solicits information from agencies in a prescribed format and timeframe. A finely constructed and well-written RFP will generate detailed and meaningful responses from agencies in a consistent layout that allows firms to be compared side-by-side.

Yet writing the RFP itself can be a daunting task, especially if a client doesn't have an internal procurement department. It doesn't have to be a painful or difficult process, however, as an RFP can be divided into three broad sections: setting the stage; defining deliverables; and delineating deadlines and parameters.

Setting the stage

The first section of your RFP is where you introduce yourself to potential agency respondents, and give an overview of why you are hiring a public relations firm. This section would typically include a few paragraphs about your organization, including history, current status of your organization and your communications program, and plans for the short- and long-term future. You don't need to go into tremendous detail here, as respondents can (and should!) research you on the Internet for their own further knowledge. In fact, one sign of a good agency will be how much research they conduct about you on their own, and then incorporate into their response.

After the introduction, you might also want to provide overall goals and expectations you have for a successful public relations program. Are you hiring an agency to grow/expand your business? Increase your visibility and brand awareness? Help influence legislators, regulators, or shareholders? A combination of the above? An explanation of your expectations will help the responding agencies understand the task before them, and know how best to answer the questions posed in your RFP.

Note that if you are going to provide any detailed or proprietary information, you might want to have participating agencies sign a confidentiality or non-disclosure agreement (NDA) from your legal department before providing them with your RFP.

Defining deliverables

Now that you've set the stage with your introductory section, it's time to delve into the deliverables. This is where you outline the scope-of-work, i.e., what specifically you

expect the agency to do for your organization.

Of course, the scope-of-work varies for each client. Your scope-of-work might include overall strategy and message development; creation of press materials; daily proactive and reactive media relations; product launches and trade show support; industry and/or financial analyst relations; employee communications; crisis communications; website design and management; social media relations; and a host of other public relations and marketing communications activities.

In this section, it is helpful to the responding agencies if you can prioritize your list of tasks and deliverables. It's also beneficial for you to explain what internal resources (your own in-house staff) are also assigned to public relations, and what budget (actual or approximate) you will be allocating to the PR effort. This information helps the agency allocate their resources and your budget most effectively.

Delineating deadlines and parameters

This final section of your RFP is where you provide the framework for how you want the agency to respond — both what to include in their proposal to you, and how/when to deliver it.

RFPs typically ask respondents to provide basic information about their company, including the agency's overall philosophy/approach to public relations, years in business, areas of specialty, and key staff who will be assigned to the account.

Following this, you will move on to the heart of the discussion – how the agency proposes to meet your overall objectives and deliverables. You should be reasonable here and expect the agency to demonstrate some strategic thinking, knowledge of your business based on their own research, and creative approach to your objectives. However, keep in mind that the agencies are not yet fully aware of the intricacies of your organization, nor are they willing to provide tremendous amounts of “free thinking” before knowing if they will be hired and compensated for their work.

Next, you'll want to ask the critical question: what will all this cost? You should ask the agency for a detailed breakdown of how they will use your budget, or what budget they propose if you haven't provided one in your deliverables discussion. Your budget question should include a request for a break-out of agency time and for out-of-pocket expenses, an explanation of any agency mark-ups, and what kind of weekly or monthly summary they provide of their work and accomplishments relative to the budget.

Providing a ballpark sense of your potential PR budget can also go a long way to streamlining the RFP process. When an agency has a feeling for the budget parameters, it has a much better chance of providing a realistic, on-target response.

Finally, you're ready to set the parameters of the requested response from agencies. This includes when their proposals are due, how they ask questions they might have (via e-mail or a conference call with all participants is usually easiest), how to submit their proposal (number of hard copies or electronically), how many pages their proposal can be (you might want to set a limit to save your eyes and save some trees), and what

the approximate timeframe and next steps will be for your review and response back to them.

Once you've generated your RFP, you're then ready to select the agencies you'd like to participate in your review process, and then begin your search. It's an interesting and exciting process. Happy hunting for your new public relations partner!

Dave Groobert is a senior vice-president and general manager of Environics Communications USA. He works in the company's Washington, DC, office.