

PR RFPs: Client Best Practices



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Among the challenges facing clients issuing RFPs is providing agencies with the information they need to participate and the confidence of knowing that the process will be fair and time efficient.

Following the client-focused best RFP practices outlined here are key to encouraging agency engagement.

- Prior to issuing a comprehensive RFP, send an RFQ to targeted agencies to determine qualifications, true expertise, and to ensure there are no conflicts. The RFQ should be short and simple to complete.

- Only send RFPs to agencies you have researched, pre-screened, and which appear to have the right mix of capabilities and experience to meet your needs. Blanketing the industry with your RFP will disincentivize the agencies you want to participate from doing so.
- Provide **all** the information in the RFP that an agency will need to determine if they are a good fit and want to participate. This must include a budget and a specific timeline for the process and the project. Be prepared for agencies to decline if the fit is not right. This is a good thing and will save both you and the agency time.
- Only send an RFQ or RFP if you are genuinely looking to hire a new agency. Don't ask agencies to respond to a proposal if you're just testing the waters or don't have internal sign-off on the budget. This not only wastes the agencies' time; it will damage your reputation.
- It's important to respect agencies' time and make it easy for them to complete an RFQ and RFP quickly and efficiently. Ask **only** for the information you need to make a decision and then move to the next step.
- Following your review of RFP responses, select two or three (at the most) finalists for presentations, since this requires the most work, then meet via Zoom or in person to go through ideas and check fit.
- Keep to the schedule you outlined for the selection process.
- Take the time to provide feedback to agencies that make presentations. They've done a lot of work.
- If you ask agencies to invest the time to develop comprehensive programs or any form of creatives, they should be compensated.

- Agencies should be evaluated based on their work, ideas, team and fit. Always check references.

Following these principles is not only important for individual firms but the entire industry. Fishing expeditions, rigged processes, lack of a budget, short deadlines, or poorly structured RFPs discourage agency engagement.

Underscoring the importance of building confidence in RFPs, we incorporated these best practices into CommunicationsMatch™'s online RFQ/RFP tool, Agency Select™, developed with RFP Associates. The built-in qualifications-based search process, for example, offers a powerful way to create shortlists of agencies or professionals based on expertise and skillsets. And, through customizable streamlined template RFQs and RFPs that provide the information agencies need to make the decision to respond, we made them quick to create, send, complete and review.

However you choose to produce an RFQ or RFP, following these guidelines will serve as the basis for a much-needed fix to what many currently believe is a broken process.

About the Authors: Former corporate communications and agency leaders, Locke, Drake and Udowitz partnered to deliver the industry's first integrated online agency search and RFP tools, Agency Select™, and help clients with projects that range from finding agencies in local markets to complex turn-key agency of record assignments.