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ask the right questions
find the right answers

Social Media RFP Template

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social media group

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NOTE: This document is provided only as an example of a social media RFP and as such, it is generic in nature and not suitable for use without revision. New sections can and should be added to address specific needs and legal requirements of the issuing company. This document is not intended to constitute professional advice.

About This Template

Social Media Group developed the original **Social Media Request for Proposal (SMRFP)** template in January 2010 to assist organizations in selecting a provider of social media professional services. This template has been widely adopted: in early January, 2010, searches for “social media RFP” generated fewer than two pages of results, whereas in December 2010 this search returned over 90,000 links.

Many of our peers and colleagues have encountered the template, and their feedback has been fairly consistent: while valuable, the template is too long, has too many questions, and many clients and purchasing departments are simply cutting and pasting the content with little or no thought about their actual needs. In other words, the Social Media RFP has in some ways become more of a hindrance than a help (SMG has also experienced this firsthand).

So, it's time for a revision.

This document, now **V2.0**, is freely available for modifying or adapting for any purpose. The questions listed below should apply to a wide variety of organizations including business-to-consumer, business-to-business, government and non-profit.

RFP “Bill of Rights”

In every sense of the word, responding to an RFP should be a partnership. You (as the issuer) are offering an opportunity to win new business. They (as the respondent) are investing in that opportunity with no certainty that their investment will pay off. As a client, you do have obligations to vendors who respond to your RFP. The following “Bill of Rights” is intended to encourage fairness and acknowledge this investment and the mutual respect that should be observed in all business relationships.

I will not issue an RFP “Cattle Call”. Issuing an RFP to more than six or seven agencies is overkill. Instead, identify agencies you would like to work with and be selective in whom you invite to respond. Fifteen or 20 responses are too many to be able to truly judge relative merit, and it’s wrong to ask agencies who are not a good fit to waste valuable resources on an RFP they are unlikely to win.

I will be thoughtful. This and other RFP templates are intended to provide guidance, but don’t simply cut and paste the contents. Think about what you actually need and edit accordingly. Information overload will only winnow out quality agencies that are too busy to wade through all the unnecessary details.

I will do my own homework. Asking agencies to identify their own competition is only going to get you two things: a list of second-tier competitors that is of dubious value and respondents annoyed that you essentially asked them to undermine their own competitive advantage. A thorough briefing on your needs at some point during the process is also essential for success (ever heard the phrase “garbage in, garbage out”?). Spend the time.

I will be flexible. Yes, we know you have a timeline. We also know (even though you might not) that it is going to slip. Don’t ask vendors to meet your timelines or else. There are significant cost savings in being able to book flights in advance (and you want an agency that keeps an eye on the pennies, right?). Give respondents at least a week’s notice and be flexible in your dates.

I will keep you updated. Nothing is worse than the “black hole”. A response is prepared at great effort, submitted and... crickets. Let respondents know that their RFP has been received, and what the next steps are. When the dates slip, let them know that, too. They put a lot into their submission – show them the respect that this effort deserves.

I will give you feedback. You can’t win ‘em all – any agency team who responds to RFPs knows this well. What they don’t know (magic crystal balls being in short supply) is why they didn’t make it to the next round or win the brass ring. Acknowledging vendors’ efforts and letting them know why their response didn’t meet your needs helps them improve, and is more than a fair trade for the cost and effort invested on their part. It also ensures good feelings – you never know what your needs might be next; maintaining good vendor relationships is good business.

Introduction

The purpose of this section is to give a brief overview of the company issuing the RFP and the social media project or desired work relationship between the company and the vendor. The template is divided into two sections: questions that should be asked during the RFP or RFI portion of your search for a vendor, and questions that should be asked during the in-person presentation you will presumably schedule with a short-list of vendors.

Needs Assessment

We require the following social media services [include only the sections specific to the services you require. If you are unsure of your needs, you may wish to hire a consultant to undertake a short consultation for an accurate needs assessment]:

1. Social Media Strategy (please specify – product, campaign, service, division or holistic organization, regional and/or global mix)
2. Reputation Management/Social Media Monitoring
3. Enterprise Services – internal collaboration and organization readiness
4. Social Media Training
5. Social Media Marketing Services (tactical executions)
6. Social PR (tactical executions)

General Overview

COMPANY OVERVIEW

1. <Company ABC's History>
2. <Company ABC's business objectives>
3. <Reasons why Company ABC intends to participate in social media>

OVERVIEW OF PROJECT

1. <Objectives of the project>
2. <Explanation of type of vendor relationship desired i.e. Project-based, Agency of Record, etc>

OVERVIEW OF AUDIENCES AND STAKEHOLDERS

1. <List primary audiences for the company, i.e. demographics, psychographics, etc>
2. <List primary information needs of each audience group>

PRIMARY CONTACT

1. <List Company ABC's primary contact for questions related to process and RFP document>

Proposal Details

1. This document issued to list of <Number> potential Vendors by <Day> <Month> 20XX
2. Questions from potential Vendors to be received by <Day> <Month> 20XX (please specify

which format –phone call, email, fax)

3. Questions and answers to be distributed to all respondents by <Day> <Month> 20XX
4. On the basis of the replies to the RFP document, a short list of potential Vendors will be selected and this group will be asked to present demonstrations of their capabilities and vision for the project. These meetings will be completed by <Month> XXth, 20XX
5. Awarding of the contract to selected Vendor by <Month> XXth, 20XX
6. Work to commence by <Day> <Month> 20XX (include completion date if appropriate).

Vendor Questions and Qualifications

COMPANY DETAILS

1. Your Company Legal Name.
2. Parent Company (if applicable).
3. Ownership structure.
4. Years in operation.
5. Mailing address (Head Office).
6. Other office locations.
7. Main telephone.
8. Fax number.
9. Primary contact (name, title, phone and email address).
10. Total number of employees.
11. Number of employees whose primary function is social media.
12. Top five social media clients by revenue percentage and length of relationship.
13. Current clients (social media only).
14. Percentage of total revenue that is social-media related.
15. Please list three references for social media work including; Company name, primary client name, contact details and services provided.
16. List of accounts lost or resigned in the last two years.
17. Please list any potential conflicts with existing clients and this RFP.
18. Senior social media staff bios, including links to social media profiles.

GENERAL

1. What social media services do you provide?
2. Do you have any proprietary tools or products related to social media/this RFP?
3. Please list and provide links to social media communication channels for your company (i.e. blog, Twitter account, Facebook group, etc.).
4. Case Studies should be in the following format: *Client Requirements, Challenges, Approach and Value Delivered.*

Services

Strategy

RFP QUESTIONS

1. Please outline your social media strategy process.
2. Describe/provide an excerpt from the final deliverable of a strategy engagement (specifics should be removed).
3. Provide a case study of your strategy work that resulted in a social media initiative and the business results achieved.

IN-PERSON PRESENTATION QUESTIONS

1. Which stakeholder groups do you typically include in a strategy engagement?
2. What is your approach to risk management in social media?
3. Describe your approach to integrating across client marketing, customer service and corporate communications departments. Please provide an example of your work in this area.
4. How do you ensure compliance with client legal requirements?
5. How do you approach adapting a traditional brand into a two-way dialogue?

Reputation Management / Social Media Monitoring

RFP QUESTIONS:

1. What is your brand/reputation monitoring process (i.e. proprietary tools used, methodology, etc)?
2. Please detail various levels of monitoring and when they are appropriate.
3. Please detail your methodology/workflow for handling online crises.
4. Please describe the structure of your crisis management team, including bios and relevant experience.
5. Please include a sample of your monitoring report format and/or a link to appropriate dashboards (specifics should be removed).
6. Please provide a case study detailing your work in managing reputation or online crises.

IN-PERSON PRESENTATION QUESTIONS

1. What do you think about automated sentiment analysis?
2. What technology do you use to assist in online monitoring?
3. How long (on average) between a potential issue being posted online and being flagged to the client?
4. How do you assess which mentions require immediate responses and which do not?
5. What volume of mentions has your organization handled in the past (e.g. 2,500 mentions per week)?
6. What is your quality assurance process to ensure that the large volumes of data gathered in the monitoring process are handled efficiently and representative of the overall online conversation?
7. Please outline your general approach to sourcing and responding to comments.

Training

RFP QUESTIONS

1. What format does your recommended training take (i.e. workshops, presentations, walkthroughs, webinars/online learning)?
2. How do you measure progress and evaluate training effectiveness?
3. Do you have experience working with any Learning Management Systems (LMS) for online training? If so, which ones?
4. Please provide testimonials or feedback from past training participants.
5. Please provide sample curriculum/outline.
6. Please provide a training case study.

IN-PERSON PRESENTATION QUESTIONS

1. What internal processes do you have in place to ensure your staff are kept current on social media innovations and best practices?
2. Who are your preferred technology partners for online training?
3. Do you have instructional designers on staff?
4. Who would deliver training and what are their qualifications?
5. What types of materials, guides or manuals do you provide to compliment the training?
6. Do you provide a method for ongoing training of new hires or new staff?

Social Media Marketing

RFP QUESTIONS

1. Please provide two to three top-level campaign concepts for Company/Product/Service ABC that allow us to see your concept development and creative thinking abilities.
2. What are your in-house web design/build capabilities?
3. Please provide a sample of a measurement document or final report (with specifics removed).
4. Provide case studies from at least two social media marketing campaigns.

IN-PERSON PRESENTATION QUESTIONS

1. Please detail your creative process as it relates to social media campaigns.
2. What is your process for validating social media campaign concepts?
3. How do you incorporate existing applications, websites, microsites and newsletter programs into your overall social media campaigns?
4. What platforms and software do you use and recommend for social media marketing management?
5. What methodology do you use for measuring the success of your social media programs for clients? Can you give us an example?
6. Tell us about a social media marketing campaign you were responsible for that didn't achieve objectives. Why?

Content, Community and Influencer Outreach (Social PR)

RFP QUESTIONS

1. What is your point-of-view on the December 1, 2009 FTC *Guides for Advertisers* and their impact on your influencer outreach programs? How have you put this into action?
2. What is your approach to content in social media?
3. Please list any experience you have with integrating social, paid and/or earned media.
4. What are your community management capabilities?
5. Provide examples of social media channel development work completed within the last two years.
6. Please provide a case study from a social media outreach project.

IN-PERSON PRESENTATION QUESTIONS

1. How do you determine and define “influence”?
2. What is your process for identifying influencers within various social media channels?
3. What is your outreach process for communicating with identified online influencers?
4. What tools and approaches do you use for Influencer Relationship Management (third-party, proprietary, etc.)?
5. How have you integrated Influencer Outreach with traditional communications and/or marketing campaigns?
6. How do you approach seeding conversations within influencer groups?
7. What is your exit strategy with influencers once the initiative is completed?
8. How do you ensure authenticity and transparency when conducting outreach on behalf of a client?
9. Tell us about your philosophy as it relates to community management.

Client Services & Project Management

RFP QUESTIONS

1. Please outline your project communication structure. If your account staff is separate from your project management staff, please detail how these teams work together/with the client.
2. Who will be assigned to our business (please provide names, titles and short biographical notes)?

IN-PERSON PRESENTATION QUESTIONS

1. What percentage of senior staff involvement is structured into your projects? What role do they play?
2. What is your rate card?
3. How are your projects priced? – Using an hourly rate? Blended agency rate?
4. What change management practices does your agency employ?
5. What reports will be provided to us in order to communicate project milestones and overall project health?

6. What is your accountability structure against budgets and deliverables over long-term client relationships?

Evaluation Tools - In-Person Presentation

METRICS & MEASUREMENT:

1. Have you developed any proprietary metrics? How have you applied these for clients?
2. How have you defined ROI from a social media perspective in the past?
3. How do you take data points generated from various social media channels and measurement tools and combine them to give an objective/comprehensive view?
4. What is your approach to server-side analytics and community analytics for program measurement?
5. Do you have the capability to measure cost per lead or cost per acquisition?
6. What platforms are you unable to measure accurately, or able to provide only limited measurements from?

SOCIAL MEDIA CHANNELS:

Please describe your experience with the following platforms and tactics:

- Augmented reality
- Blogs
- Crowdsourcing or Wikis
- E-mail Newsletter Campaigns
- Facebook Apps
- Facebook Groups or Pages
- Forums
- News sharing sites (i.e. Digg, Reddit, etc.)
- Other content sharing sites (i.e. Scribd, Slideshare, Delicious, etc.)
- Other social networks and social networking tools
- Photo sharing (i.e. Flickr)
- Video sharing (i.e. YouTube)
- Podcasting
- Real world events organized via social media (e.g. Tweetups)
- Ratings/Customer service sites (i.e. Yelp, ePinions, etc.)
- Social Customer Relationship Management (Social CRM)
- Social Media press releases (SMPRs)
- Twitter or other forms of microblogging
- Virtual Worlds
- YouTube or similar video sharing sites

About Social Media Group

Established in 2006 and with global headquarters in Toronto, Ontario, **Social Media Group** is one of the world's most respected independent agencies helping business navigate the new socially engaged Web. We take the best of both worlds: thorough business oriented consulting to uncover true strategic objectives combined with tactical execution that unleashes the creative energy and precision-oriented results of a top-flight integrated communications firm. Services include corporate social media strategy and tactical execution, content creation and management, community engagement, online conversation research and insights, reputation measurement and monitoring, educational seminars and workshops.

SMG clients include **3M, Ford Motor Company, SAP, Thomson Reuters, CNN,** and the **Princess Margaret Hospital Foundation.**

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