



RFP Checklist

1. Getting ready for an RFP



✓ Research

Ask your network for recommendations, research online and schedule meetings or calls before issuing the full brief. Calls can be used for prequalification and will help move a longlist to a shortlist of five or so.

✓ Check Contracts

If you have a contract that requires a six-month notice period, consider giving notice now. That way, when you find the perfect partner the service switch will happen sooner rather than later.

✓ Stakeholders

Involve everyone who is part of the decision-making process from the outset.

Are all stakeholders clear about their goals? You'll need clarity to ensure you're talking to providers who can fulfil those goals.

✓ Objectives

Identify clear objectives for what the monitoring and measurement service needs to achieve

Define any challenges that need solving – but don't over prescribe so you receive creative and consultative responses.

Try and think future-proof too. Ask vendors how they're able to scale up and down should you have acquisitions, new products, new markets etc that may need specific treatment.

✓ Scope and Budget

This is not a wish list. Strike a balance between being too generic and too specific, state requirements but allow creative scope.

Don't just list the metrics you use currently, ask the agency about outcome-based measurement, this will ensure you're measuring what matters.

Be realistic and specific about countries, languages and media types etc. List markets and competitors by importance as you may scale analysis according to tiers.

Where possible provide a budget range to align expectations and ensure you only receive responses that are viable options.

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2. People-Buy-People



✓ Chemistry

It's incredibly important to meet the people who will help you demonstrate your PR and communications value. Make time for face-to-face meetings so you can check chemistry and look 'behind the curtain'.

✓ People v Tech

Tech and AI is fantastic for crunching data but it's experienced human analysts that give you the insights you need to prove PR value and optimise your comms strategy. The way the consultants use the data that will ultimately make the real difference for you

✓ Partner v Vendor

A good agency will want to demonstrate how they can best serve your needs. Include open questions – how, what, when, why, describe – to give the agency opportunity to be creative and consultative in its response.

Avoid prescriptive response formats, while tick boxes are useful for some elements you should make room for creativity. You can curtail waffle by limiting word count.

✓ Share

State how measurement reports will be used and who will receive them. Encourage a dialogue between you and prospective agencies. The more you share about your expectations the better. If necessary, issue a Confidentiality Agreement.



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3. Timings & Approach



✓ Final Stages

Allow 5-7 days for agencies to review the brief and submit any questions by email

Keep things moving with prompt email responses and ensure all participants are privy to the same information, but don't share who asked the question.

Allow around four weeks for every potential partner to submit their proposals.

Include a presentation stage. Even if there's a front-runner from the RFP process, meet the top two contenders so you can discuss and compare their approaches. Include internal stakeholders so they can ensure their requirements will be met and you get their buy-in.

Critically, ensure you meet the agency team you'll be working with. After the contract award there'll be a set up period followed by a period of collaborative adjustment before the service can run as 'business as usual'. Request an implementation plan as part of the RFP. Good analysis services are not just turned on at the flick of a switch, so work together towards mutual milestones.

✓ Contracts

Always read the small print. You may find auto-renewals buried in the t's & c's which will catch you out.

If you need flexibility, ask vendors what contract terms they will work to and what notice period is required.

The hallmark of a trusted partner is one that offers ideas instead of ticking boxes.

So when it comes to putting your media measurement out to tender, remember – the best match needn't cost you a fortune. In fact, the best partnerships aren't built on price. The relationships that work best are those built on trust and understanding. Start there with your RFP process, and you can bet you're on a good track.