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Find the right partner.

Social Media RFP Template

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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.

Social Media Request for Proposal Template

ABOUT THIS TEMPLATE

Social Media Group (socialmediagroup.com) has developed this Social Media Request for Proposal (SMRFP) template to assist organizations in selecting a provider of social media professional services. This document 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.

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.

1. Company Overview
 - <Company ABC's History>
 - <Company ABC's business objectives>
 - <Reasons why Company ABC intends to participate in social media>
2. Overview of Project
 - <Objectives of the project>
 - <Explanation of type of vendor relationship desired i.e. Project-based, Agency of Record, etc>
3. Overview of Audiences and Stakeholders
 - <List primary audiences for the company, i.e. demographics, psychographics, etc>
 - <List primary information needs of each audience group>
4. Primary contact
 - <List Company ABC's primary contact for questions related to process and RFI document>

Guidelines for Proposal Preparation

1. Issuance of this document to a list of 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. Responses from issuer to be sent 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

Vendor Questions and Qualifications

COMPANY DETAILS

1. Vendor Company 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. Web URL
10. Vendor blog URL
11. Primary Vendor contact (name, title, phone and email address)
12. Total number of Vendor employees
13. Number of Vendor employees whose primary function is social media
14. Top five social media clients by revenue percentage and length of relationship
15. Current clients (social media work only)
16. Percentage of total revenue that is social-media related
17. Please list three references for social media work including; Company name, primary client name, contact details and brief explanation of services provided
18. List of accounts lost or resigned in the last two years
19. Please list any potential conflicts with existing Vendor client base and this RFP
20. Senior social media staff bios
21. Links to senior social media staff profiles on social sites (i.e. LinkedIn, Twitter, Facebook...)
22. Please provide a complete list of relevant social media platform and technology partners, with URLs
23. If a partner, outside contractor or anyone not currently employed with the company has prepared any part of this response, please list details

GENERAL

1. Please list all social media services provided to clients
2. Do you have any proprietary tools or products related to social media?
3. Please list any experience you have with integrating social, paid and/or earned media
4. Please identify your most common type of clients, with examples: marketing, communications, IT, human resources, internal deployment of Enterprise 2.0 programs, other
5. Please list and provide links to primary social media communication channels for your company (i.e. Company blog, Twitter account, Facebook group, blogs authored by principals, etc.)

STRATEGY

1. Please outline your social media strategy process
2. Which stakeholder groups do you typically include in a strategy engagement?
3. Describe the final deliverable of a strategy engagement
4. What is your approach to risk management in social media?
5. How do you incorporate existing applications, websites, microsites and newsletter programs into your overall social media strategy?
6. How do you ensure compliance with client legal requirements?
7. Please describe your approach to integrating across client marketing, customer service and corporate communications departments? Please provide an example of your work in this area
8. How do you approach adapting a traditional brand into a two-way dialogue?
9. Please provide a case study of your strategy work that resulted in a social media initiative and the business results achieved

REPUTATION MANAGEMENT / SOCIAL MEDIA MONITORING

1. What is your brand/reputation monitoring process (i.e. proprietary tools used, methodology, etc)?
2. What is your opinion on automated sentiment analysis?
3. What technology do you use to assist in online monitoring?
4. How long (on average) between a potential issue being posted online and being flagged to the client?
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 detail your methodology for handling online crises
8. What services do you provide in support of online crisis management?
9. Please describe the structure of your crisis management team, including bios and relevant experience
10. How do you assess which mentions require immediate responses and which do not?
11. Please outline your general approach to sourcing and responding to comments
12. Please provide a case study detailing your work for the purposes of managing reputation or online crisis management, including outcomes and lessons learned
13. Please include a sample of your monitoring report format and/or a link to appropriate dashboards (specifics should be removed)

METRICS AND MEASUREMENT

1. What methodology do you use for measuring the success of your social media programs for clients? Please provide specific examples based on past work
2. Have you developed any proprietary metrics? How have you applied these for clients?
3. How have you defined R.O.I. from a social media perspective in the past?
4. How do you take data points generated from various social media channels and measurement tools and combine to give an objective/comprehensive view?
5. What is your approach to server analytics and community analytics for program measurement?
6. Do you have the capability to measure cost per lead or cost per acquisition? Please provide an example of a project on which you have done so
7. What platforms are you unable to measure accurately, or able to provide only limited measurements from?
8. Please provide a sample of a measurement document or final report (specifics should be removed)
9. What percentage of the budget do you recommend be dedicated to metrics and measurement?

EDUCATION

1. Do you offer social media training services for clients?
2. What format does your training take (i.e. workshops, presentations, walkthroughs, webinars/online learning)
3. What internal processes do you have in place to ensure that your staff are kept current on social media innovations and best practices?
4. How do you measure progress and evaluate training effectiveness?
5. Please provide sample curriculum/outline
6. Please provide testimonials or feedback from training participants

SOCIAL MEDIA CHANNELS

1. What are your design, creative and community management capabilities?
2. What percentage of staff are dedicated to building and deploying social media solutions versus management and consulting?
3. Please describe your experience with the following platforms and tactics:
 - YouTube or similar video sharing sites
 - Blogs
 - Content Management System (CMS) and Customer Relationship Management (CRM)
 - E-mail Newsletter Campaigns
 - Facebook Groups or Pages
 - Facebook Apps

- Other social networks and social networking tools
 - Mobile application development
 - Twitter or other forms of microblogging
 - News sharing sites (i.e. Digg, Reddit, etc.)
 - Virtual Worlds
 - Augmented reality
 - Photo sharing (i.e. Flickr)
 - Other content sharing sites (i.e. Scribd, Slideshare, Delicious, etc.)
 - Social Media press releases (SMPRs)
 - Crowdsourcing or Wikis
 - Forums
 - Real world events organized via social media (e.g. Tweetups)
 - Ratings/Customer service sites (i.e. Yelp, ePinions, etc.)
 - Podcasting
4. Please provide examples of social media channel development work completed within the last two years

COMMUNITY AND INFLUENCER OUTREACH (SOCIAL PR)

1. What is your process for identifying influencers within various social media channels?
2. How do you determine and define “influence”?
3. What is your outreach process for communicating with identified online influencers?
4. What is your point-of-view on the December 1, 2009 FTC *Guides for Advertisers* and their impact on your influencer outreach programs for clients? How have you put this into action?
5. What tools and approaches do you use for Influencer Relationship Management? (third-party, proprietary, etc.)
6. How have you integrated Influencer Outreach with traditional communications and/or marketing campaigns?
7. How do you approach seeding conversations within stakeholder groups?
8. What is your exit strategy with influencers once the initiative is completed?
9. How do you ensure authenticity and transparency when conducting outreach on behalf of a client?
10. Please provide a case study of an online community outreach project

CLIENT SERVICES & PROJECT MANAGEMENT

1. How is a typical client engagement with your firm structured?
2. How do you structure your account teams?
3. Please outline your internal communication structure. If your account staff is separate from your project management staff, please detail how these teams work together.
4. If you are selected to provide social media services for [Company ABC], who will be assigned to our business (please provide names, titles and short biographical notes).
5. What percentage of senior staff involvement is structured in to your projects? What role do they play?
6. What is your rate card?
7. How are your projects priced? – Using an hourly rate? blended agency rate?
8. What change management practices does your agency employ?
9. What reports will be provided to [Company ABC] in order to communicate project milestones and overall project health?
10. What is your process for gathering business requirements?
11. What is your process for client reviews or acceptance testing?



About Social Media Group

Established in 2006 and with global headquarters near Toronto, Ontario, **Social Media Group** is one of the world's largest 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, reputation measurement and monitoring, educational seminars and workshops.

Social Media Group has been **Ford Motor Company's** social media agency since 2007. Other clients include **SAP**, **Yamaha Motor**, and **ING Direct** bank, among others.

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