# RFP BEST PRACTICES FOR ORGANIZATIONS

*A Guide to Running a Productive Agency Search*

# A WELL-RUN SELECTION PROCESS BENEFITS EVERYONE.

A well-run selection process benefits everyone. You and your team take on extra work for briefing, Q&A, presentations, assessments, etc. and agencies invest significant, valuable time and creative energy to compete for your business. The more thoughtful and transparent you are as a prospective client, the better proposal submissions you will see and the stronger the partnership you will begin to build. This is the best way to create value for your company and its brands.

# BEFORE YOU SEND
# THE RFP BRIEF DOCUMENT

## BE INTENTIONAL ABOUT WHO YOU INVITE

The overall process *is* expensive — for you and for the agencies. A broad search does not necessarily produce better results, though it will produce more noise and perhaps unwanted attention. Conduct due diligence research before reaching out to agencies. Narrow your list to those that have the right capabilities, sector experience, and cultural fit. Organizations like the PR Council can help you identify agencies that match your key selection criteria.

- Resist the temptation to run a wide-open search.
- Limit initial outreach to 4-5 agencies for a credentials (RFI) stage.
- Invite 2-3 finalists for the RFP submission and full pitch presentation, preferably conducted in person.

## FORM A COMMITTED SELECTION TEAM

Every pitch review of any significance requires the consistent involvement of a fixed selection team throughout the process. This team is composed of key internal stakeholders, from communications leads and budget owners to appropriate procurement / finance professionals.

## CONSIDER A TWO-STAGE PROCESS

As a first step, a written RFI (Request for Information) lets you assess capabilities and fit before investing in a full pitch process. Only take your true shortlist to a full RFP submission and presentation stage. This respects everyone's time and tends to produce better final work.

### Vet both your RFI and RFP with internal decision-makers

These documents are critical to finding the right agency partner. AI can help you draft the RFI and/or RFP, but treat its output as a starting point. Before you send anything to agencies, review the draft against your actual business problem, the specific capabilities you are assessing, and your internal evaluation criteria.

### Spell out the deliverables and deadlines by stage

Too often, an RFI or RFP doesn't clarify what's being asked for and at what point. Credentials? Creative? Strategy? Being clear about what's due, in what format, and by when, at each separate stage, saves everyone time and sets a disciplined tone from the start.

## MAKE SURE YOUR BUDGET IS APPROVED BEFORE YOU START

Do not launch a pitch selection process if internal sign-off on the project or overall budget is still pending. Without confirmed funding, agencies can’t scope their thinking to the right spending level, and if a pitch turns out to be for an initiative that was not properly funded, the agencies may very well have invested significant, unrecoverable time.

### Consider disclosing information about the competitive set

Agreeing to participate in a review process costs significant time and money for *all* parties, so consider sharing the number of agencies invited to pitch and whether the incumbent is included.

# BEFORE YOU ISSUE THE BRIEF:

## 1 Make sure you and your team are aligned on strategic questions

- What business problem does this engagement need to solve?
- Who specifically needs to think or act differently, and what does that change look like?
- What do we know about where things stand today — what baseline are we working from?
- At six months, what will demonstrate this engagement was worth the investment?
- What does the internal decision-making process look like — how fast can you approve action?

## 2 Confirm organizational readiness

- Project timelines are realistic and committed team members are available.
- Procurement and legal processes are clear and understood by decision-makers.

> *Launching a search before the organization is aligned often results in unnecessary delays and additional work for both the client and the agencies.*

# WRITING A BRIEF THAT GETS ON-STRATEGY RESPONSES

## DESCRIBE THE BUSINESS PROBLEM

The best briefs start with context: what is the business challenge you are trying to solve, by when, and what does success look like? “Make my brand a household name” is aspirational, not concrete. The more specific you are about the problem, the more useful the responses you will receive.

### Define your target audience with precision

Broad audience descriptors set agencies up to miss. “Key stakeholders” is not an audience. “Mid-level procurement managers at enterprise companies who are currently evaluating legacy providers” is an audience. The more specific your audience definition, the more targeted and useful the strategy you will get back.

## SHARE A BUDGET — EVEN IF ONLY A RANGE

Withholding budget information creates confusion and will result in comparing apples-to-oranges, as candidate agencies are forced to guess your budget. Agencies cannot scope their thinking or staff their proposals appropriately without it. A range is fine; having agencies scope to the same range allows you to evaluate them consistently.

### Be transparent about all non-negotiables

Where does an agency need to provide physical support (e.g., West Coast presence, UK office, or a truly global footprint)? Will the review include online or templated pricing negotiations? Are you requiring extended payment terms beyond 30 days? (Extended payment terms are worth thinking through carefully. Agencies typically operate on 30-45 day cycles and often have to pay third parties before receiving client payments.) Will the prevailing agency have to accept the MSA as proposed in the RFP, or will there be further negotiations once they are awarded the business?

You should disclose all non-negotiables in the initial documents, as participating agencies may choose to decline participation if it includes factors not aligned with their operating standards.

## DEFINE YOUR EVALUATION CRITERIA UPFRONT

Be crystal clear on how agencies will be judged: RFP submission, sector expertise, team composition, strategic thinking, cultural fit, final presentation, value. Sharing your scoring criteria in advance produces more comparable responses and signals that your entire process is fair.

## GIVE AGENCIES ENOUGH TIME TO DO GOOD WORK

An accelerated brief process produces rushed thinking. Build a realistic timeline that gives agencies at least 3-4 weeks for a full RFP submission after the brief is issued. A tight deadline limits the quality of thinking agencies can bring; building in enough time is one of the clearest ways to demonstrate you want their best thinking and how you will work with them in the future.

> **Stick to the timeline as closely as possible**
>
> Agencies assemble teams based on your needs and may secure individuals' time for you until a decision is made. If decision timing slips significantly, it is a best practice to advise candidate agencies immediately, as they may need to reassign any committed team members.

## SHARE RELEVANT BACKGROUND MATERIALS

Include what you can: brand guidelines, recent campaign results (good and bad), audience research, competitive context, and any prior communications audits. The more context agencies have, the more tailored and useful their proposal submissions will be.

### Offer participants individual Q&A sessions with internal decision-makers

Separate Q&A sessions with participating agencies, rather than a group session, give you a much clearer read on how an agency thinks, and lets them ask questions they may otherwise hold back in front of competitors. Include only as many agencies as you and your selection team have time to host. It makes more sense to schedule these at the RFP stage rather than with all RFI recipients.

### Specify who you want to see in the pitch

Some clients prefer to see the day-to-day team that will be working on their business; others may want to include the CEO or other functional leaders to confirm how important the business is to the agency. Do you require early-career talent in the room, or would you prefer the opportunity to dig deep with the key seasoned people who will be the lead strategic consultants?

# DURING THE PITCH PROCESS

## STICK TO THE TIMELINE

If you set a schedule, honor it. Delays create uncertainty for participating teams; communicate as early as possible if timing needs to shift.

## HAVE DECISION-MAKERS IN THE ROOM

The selection team, the people who will ultimately choose the agency, must be present at all the pitch presentations. Agencies are also evaluating the client relationship in that room, and they deserve to meet the people they will be working with. Keep your team aligned by providing the selection criteria you shared with participating agencies. Any scorecards need to be completed by the selection team immediately following each finalist's presentation.

## CAP PRESENTATION TIME AND PROTECT Q&A

Limit presentations to no more than two hours, with at least 30 minutes reserved for genuine conversation. The discussion that follows a presentation often reveals more about an agency's thinking and your potential working relationship than the deck itself.

> **Resist additional requests unless something dramatically changed in the business**
>
> It's reasonable to ask clarifying questions after a proposal is submitted; however, avoid materially expanding the scope of work being requested after finalists' presentations and before an agency has been selected. Examples include multiple budget scenarios, detailed implementation plans, pricing for unrelated initiatives, and significant revisions to strategy or scope. If supplementary parameters are included, narrow the field to only two agencies, and consider compensating both.

# ADDITIONAL CONSIDERATIONS

# AGENCIES ARE IN DIFFERENT STAGES OF OPERATIONALIZING AI

AI is actively reshaping how agencies work: detecting signals, accelerating research, and drafting recommendations — compressing the time between an insight or trigger and subsequent action. That speed is a real advantage, but it requires senior involvement to manage both the opportunity and the risk. Consider asking the firms about their AI deployment.

## USAGE:

How will AI be used in this engagement? What does it accelerate, and where does human judgment remain essential? Aligning on this at the outset prevents mismatched expectations about what "using AI well" looks like for your business.

## SPEED:

When a signal breaks — a news moment, a competitor move, a developing issue — how fast does your team need a recommendation, and does your internal approval process support that speed?

## SENIOR ACCESS:

Which situations require senior agency involvement, and how is that determined and applied?

# AFTER THE DECISION

## CLOSE THE LOOP WITH EVERY AGENCY

Agencies invest valuable time (often nights and weekends) and creative energy in RFP participation, from start to finish. Promptly notify every finalist agency of the outcome. A brief email is sufficient, although a phone call is more appropriate.

## GIVE FEEDBACK

Constructive feedback is genuinely valued. You do not need to write a detailed critique; optimally, a brief, scheduled phone call highlighting where a candidate agency stood out and where they fell short is invaluable to non-prevailing participants and shows respect for the effort they put forward throughout their involvement. Agencies will appreciate the honesty and use it to improve.

# A NOTE ON THESE GUIDELINES

These are offered as guidance. The best pitch processes are built on mutual respect, transparency, and a shared interest in finding the right fit. When both sides approach the entire process in good faith, everyone wins.

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