

IAB Canada believes that a *clearly articulated* request for information (RFI) and/or request for proposal (RFP), including the subsequent scope of work, is essential to business success - especially in the area of digital marketing. We are pleased to help marketers and agencies scope out the nature of their business relationship(s) by offering the following document.

It is yours to amend, add, revise, delete or make suggestions back to IAB Canada for inclusion.

REQUEST FOR INFORMATION/PROPOSAL

DIGITAL AGENCY ASSIGNMENT

The Client (The Client) is seeking an Agency to handle its digital communications (The Agency). The Agency must be a <conditions of ownership> able to work in both official languages (English and French). It is preferred The Agency has or establishes offices in the following locations: <locations>. Work conducted within this agreement must be performed by Canadian citizens or persons legally residing within Canada <offshore or no offshore>

THE SUBMISSION

- What material to submit
- To whom
- In what format
- By when?

MORE ABOUT THE CLIENT

Background - Description of The Client's business, history, focus, scope of brands/products, amount of sales, importance of online channel to the business, number of employees etc.

Describe The Client's opportunity/challenge, why is The Client looking for a digital agency at this time. Have they had one before, what has changed?



Request for Information (RFI)/Request for Proposal (RFP) Template

Current digital assets

Size, history, importance and relevant statistics about The Client's properties:

- Owned and operated websites
- Social channels (i.e. Facebook, LinkedIn pages/groups, Twitter accounts, YouTube channel, etc.)
- Email list
- CRM database
- Other installed technologies

The Client should also confirm the names of other communication partners they are currently working with.

THE SCOPE OF WORK REQUIRED

This document will detail the scope of work for the assignment, preferred remuneration models and the process/timeline to award the business.

The scope of work includes account management of digital communications across paid, owned and earned target touch-points. The Agency's responsibilities include tasks throughout the discovery, definition, design, development, deployment, distribution, measurement and maintenance phases. There are some out of scope tasks that will be managed by The Client through other partners where collaboration with The Agency is critical. These will be identified in the detailed scope of work as "out of scope". The Agency, with Client knowledge and permission can sub-contract specific tasks and assignments to other Canadian incorporated companies.

The scope of work will include <X> divisions within The Client as managed by The Client. Each division will be approached by The Agency with the standard methodology. The Agency will be the exclusive provider of in-scope work. Specifically the divisions are : <list>

The term of contract will be for <x> years with annual performance reviews based on a mutually agreed upon score card of performance metrics rated by both Client and Agency.

The budget for all services, technology, fees, licenses, productions across all Client's divisions will be no less than <X> million dollars annually with a likely range approximately <x> to <x> million annually.

DETAILED SCOPE OF WORK

Broadly the list of tasks required includes but are not limited to:

- Account management / project management
- Communications strategy
- Creative development (may/may not include website development)
- Media planning
- Social media management
- Results analysis
- Marketing technology recommendations
- Training

Account Management

The Agency will provide a senior lead that manages our relationship and The Agency's team. They are responsible for the composition, performance of The Agency team in respect to quality of work, timeliness of delivery, ability to work within budget and ability to deliver the communications objectives set out in The Client brief. They will also be responsible for ensuring The Agency's team is working collaboratively with The Client's other communications partners. The Agency's account manager will be responsible writing and briefing the various Agency personnel as needed to fulfill The Client's requirements. They will identify and work collaboratively on Client training needs, Client technology needs, annual Client/Agency review and annual schedule.

Communications Strategy

The Agency will develop the digital communications strategy for The Client and The Client's divisions across all digital target touch-points. The Agency will provide a strategy development process that is staffed by a person(s) dedicated to strategy development. This person will also be responsible for keeping The Client aware of consumer trends and technology developments that have potential impacts on The Client's digital communications. The digital communications plan will take into consideration and work seamlessly with other non-digital communications.



Creative Development

The Agency will develop or manage the development of digital creative assets with budget/timeline/approval milestones throughout the process following The Agency's brief as approved by The Client. This includes but is not limited to: creative message development, design, web site production, app development, photography, video production, information architecture, usability studies, versioning and programming. The Agency may recommend sub-contracted developers with Client knowledge and approval. The Agency is responsible for all talent clearances and rights licenses in addition to pre-deployment testing. Client may include testing of creative concepts using online media/methodology for the purposes of determining offline creative direction. Client must approve all creative before becoming public.

Media Planning

The Agency will develop or manage the development of the digital media plan across paid, owned and earned media with budget/timeline/approval milestones throughout the process following The Agency's brief as approved by The Client. The Agency may recommend sub-contractors with Client knowledge and approval. If applicable, The Agency will work collaboratively with The Client's media buying AOR ensuring they are properly briefed with appropriate timeliness and direction. The Agency and Client will collaboratively define pricing and brand safety guidelines.

Social Media Management

The Agency will manage, develop and deploy The Client's pro-active and reactive messaging in social media channels according to guideline's collaboratively developed between The Agency and The Client. The Agency will use social media platforms and tools to extend and measure the distribution of The Client's communications, to alert The Client to positive and problematic messages and developments. The Agency will recruit and manage online influencers, bloggers, writers, editors, publishers and publications.

Tasks



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The Agency may be asked to perform tasks including but not limited to:

- Web site development
- App development
- Digital display advertising (banner ads, basic and rich media)
- Search engine optimization for websites
- Search engine marketing (paid search)
- Social media, monitoring
- Social community management
- Paid social media, paid advertising on social media platforms, etc.
- Online video development and distribution
- Mobile media
- Governance
- Competitive insights/review
- Content management system development/integration
- User experience and quality assurance
- Prototyping of concept/information flow/user interface

Results Analysis

The Agency will collect data across all digital touch-points to aggregate into a report(s) that ensures all creative and media communications are working properly, contracts are being honoured and problems/opportunities are followed up on. The Agency in collaboration with The Client, and The Client's other partners (if applicable), will create a tagging methodology for digital platforms/sites and deliver /manage all tags for the purposes of gathering performance information. The report will be presented to The Client on a periodic basis and shared with other stakeholders as requested by The Client.

Marketing Technology Recommendations

The Agency and The Client will agree to set of digital marketing technologies to be used within the relationship. This may include project management software that requires use by Client, Agency and other vendors for all to realize benefits. Capabilities, fees, staffing, training, usage and benefits of each tool will be reviewed and agreed upon by Client and Agency. From time to time The Client and Agency may propose and change, introducing or eliminating technologies. The Agency will ensure The Client is fully aware of any potentially negative or misleading outcomes from the use of technologies.



Request for Information (RFI)/Request for Proposal (RFP) Template

The Agency will conduct a review of the existing technologies, propose new additions, replacements, map connections between technologies to organize and integrate all digital touch-points as required.

The Agency will provide a thorough briefing of its proprietary tools and how they can be applied to The Client's business. The Agency will define which tools are part of their service offering and which ones are available for extra fee.

Training

The Client will schedule training sessions for its staff provided by The Agency or Agency recommended partners. The aim of the training is to ensure The Client understands The Agency's process, capabilities, technologies, consumer trends in general, digital marketing best practices and benchmarks.

Governance

The Agency will provide digital file retention, asset management, accounting services, and contract management relevant to The Client's business. The Agency will define roles and responsibilities between The Agency and The Client, create a decision making policy and process for all tasks and deliver guidelines for online editorial, social media, SEO and SEM, accessibility and design guides. The Agency agrees The Client may be audited for accounting or process purposes.

NOT IN SCOPE

List items.

TELL US MORE ABOUT YOUR AGENCY



Positioning, Vision, Philosophy

What position has your Agency taken in the competitive digital environment?

Where do you see your Agency 5 years from now? What actions are being taken now to get there?

What overall philosophy governs your Agency?

Strengths

Describe your Agency's area strength. How is your firm different from others? Where do you out-perform your competitors?

Is there anything special about your Agency's capabilities, experience, and expertise that The Client should know about?

Describe up to three of your Agency's achievements during the past three years.

History

When was the company founded? When was the office submitting this RFP opened?

List any subsequent mergers, acquisitions or name changes.

Who are the current owners of your firm?

What is the total revenue and number of employees for The Agency's entire organization as well as for the office submitting this RFP?

Provide a short, one-paragraph biography of your office's key executives and their current roles in your organization.

Gains and Losses

List current Clients—brands, products and services—managed by your Agency. Please list by category and then within the category by size, indicate the dates they were acquired and, if



Request for Information (RFI)/Request for Proposal (RFP) Template possible, approximate budget or project ranges for each. Also indicate if these relations are ongoing or project-based.

What accounts has The Agency acquired within the past three years, please comment on why The Agency was chosen to service these new accounts.

Of the accounts lost in the past three years, explain why you feel they left or were resigned by The Agency.

Conflicts

List the categories or product lines that your firm cannot work with at this time due to conflict restrictions.

Industry Associations

List any memberships in industry organizations, length of time as a member, involvement by any staff in such organizations, and any other pertinent information.

References

List 3 client references that The Client may contact. Please provide names, titles, company names, addresses, telephone and email addresses.

PLEASE PROVIDE AGENCY DOCUMENT EXAMPLES DEMONSTRATING YOUR ACCOUNT MANAGEMENT

- Creative brief
- Media brief
- Status update
- Budget control report
- Results dashboard

TEAM COMPOSITION



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The Agency will provide The Client with adequate resources in level of seniority, focus of expertise and capability detailed in a chart showing name, title, biography, relevant experience and cost per hour (salary plus overhead) with assigned time allocation based on a 1600 hour year.

REMUNERATION

What is the basis of compensation for The Agency? Are their performance based bonuses, what are the criteria for the bonus? Are their penalties? When is the bonus paid out?

DECISION CRITERIA

The successful Agency will be selected based on the following criteria:
(choose and weight criteria according your needs)

- Quality of proposal content
- Price
- Relevant experience
- Technical capabilities
- Agency proprietary and contracted technology
- On-Site visit
- Service delivery standards
- Presentation
- Compatibility
- Team
- History of award winning work
- Other (be sure to elaborate what other criteria will be looked at)

DECISION WILL BE AWARDED ON <DATE>.