



Issued by: Include company name, contact information, date

Introduction

Confidentiality: Indicate whether the information contained in the RFI is to be kept confidential. If there is highly confidential or proprietary content, obtain an NDA from the recipients before sending the RFI.

About Us: Use this section to introduce your company, including the market you serve, types of customers, solutions you offer, your size (i.e., revenues, number of employees), your structure, your plans for growth, and your history with PR.

PR Program Objectives: Why are you interested in engaging a PR firm? List the objectives you want to accomplish and/or the expected PR services you are seeking. Indicate whether you are looking for help with a short-term project or an ongoing PR program.

Requested Information

Agency Contact: Ask for name, title, address, phone, email, website, social.

Number of Full Time Employees and Locations of Offices: This helps you gauge the size and proximity of the firm.

Ownership/Legal: Ask about the ownership structure of the company, and ask whether the company has had any legal actions brought against it in the last seven years.

List of clients/ average size/ average term: You can ask for a full list or a list of clients that are specific to your market segment, as well as a description of the size of companies the agency represents and the average term of client engagements.

Culture: Request a brief description of the agency culture and principles.

Differentiator: Ask what makes the firm unique.

Services: Have the agency provide a list of the services it offers in-house, and those that it contracts out to other vendors or partners.



Bios of key staff: Ask for the bios of the people that are most likely to work with you. It is too early to obtain assurances that this will be the exact team, but you want to get an understanding of the caliber and experience level of the people they can commit.

Case studies: Ask for one-paragraph to one-page case studies, and no more than three case studies total, which represent the agency's work. Require that at least one of them be from the last 12 months, and none older than three years. (Do not ask for references at this stage – save that until after you have narrowed your choices down to one or two firms).

Rates: Ask for a general description of how the agency charges for its services. It is too early to ask for a specific quote, as the agency doesn't have enough information to craft a reliable one, but you should know if they charge by retainer, by the hour, or by some other method. For additional insight, you can also ask how the agency would structure a team given a monthly or annual budget you provide as an example.

Potential fit: Request a one paragraph summary of why the agency believes it may be a good fit for your company.

Conflicts: Ask the agencies to confirm that they have no conflicts of interest due to their work for existing clients.

Instructions

Timeline: Provide a deadline for responses to the RFI, as well as an indication of how you want to receive them (i.e., PDF only, no more than 6 pages). Also indicate the timeline for next steps, including follow-up meetings and expected start date.

Questions: Establish a method for responding to questions. You can offer to take a phone call, or you can require all questions be submitted by email. Remind agencies at this point that this is just an RFI and there will be plenty of opportunity for thorough questioning later in the process. You want to avoid spending lots of hours answering questions from firms that you ultimately will not invite to pitch.

To learn more about crafting an RFI and the steps you should take after receiving responses, please visit our blog on [this topic](#). For more information about RH Strategic's services, please [contact us](#).