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RFP Guide and Template

Media Planning & Buying Services

May 15, 2020

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I. Introduction and Use of the Guide

The Blackline RFP template is intended to assist procurement professionals in the creation and execution of a wide range of RFPs across industries and procurement spend categories. Although organizational and product/service needs vary, this template is a useful starting point from which to configure and customize to meet your company's specific needs.

This RFP is part of a series Blackline has identified as opportunistic and relevant based on current macro and micro economic factors, common stakeholder engagements, and complexity.

For additional information and access to pricing and scoring worksheets, please contact Blackline to speak with one of our industry experts on how we can Power Up your procurement function with our inclusive back-office support, on-site procurement services, or Blackline's Procurement Roadmap which has transformed some of the world's largest companies covering more than \$100 billion in spend. It is Blackline's commitment to bring people together to elevate procurement's role and results!

Blackline Group Inc.

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II. Request for Proposal - Media Agency

A) RFP Document

1) Company Overview:

Overview Insight [delete italics and replace with your information]

Provide a brief overview of your organization providing relevant context for participating agencies.

- a) Corporate mission*
- b) Portfolio of products/services*
- c) Employee count*
- d) Geographical footprint*
- e) Company culture*
- f) Principles and values*

Sample:

[Enter Company name] is the world's largest service provider with more than 80 million members in 100 countries and territories around the globe.

Our mission: Create mutually beneficial opportunities for every one of our customers. Our customers get access to [list all services] helping you be successful. [enter Company name] started out in the garage of our co-founder John Doe in [enter date] and has grown to the size of [enter detail].

John Doe is the CEO, and the company's management team is made up of seasoned executives who share a common vision and end-goal. [enter Company name] has a diversified business model with revenues coming from several different services and products.

2) Objective:

Objective Insight [delete italics and replace with your information]

Thoroughly describe the objective of this RFP with as many pertinent details as possible to ensure a clear and comprehensive vision is shared with Agencies. Adding all applicable details including historical and forecasted data, impacted business units, timelines, and expectations will reduce the number of questions Agencies have following the dissemination of the RFP.

Sample:

The objective of this RFP is to ascertain capabilities and execution of Media agencies. The awarded agency will be able to provide best-in-class strategic commercialization for [enter media details] across our geographic footprint (see section 6 for geographic locations pertinent to this RFP). It is vitally important to [enter Agency name] to find a partner who will meet or exceed all required service requirements (listed in Section 4) while continually finding avenues to improve and leverage key agencies where applicable by business unit and geographic footprints (ideally migrating to agencies who can leverage global footprints).

3) Background:

Background Insight [delete italics and replace with your information]

Provide a wide-ranging history of desired [enter service/product] to offer agencies an understanding of where your company has been and how you arrived at your current media state of requirements. Where possible, omit all current negative service levels to protect the organization from predatory bidding and to ensure strong partnering and continuity of supply with the incumbent agency.

Background Sample

Over the past five years [enter Agency Name] has operated in a non-consolidated state with regard to creative agencies. Projects are either handled in an ad-hoc manner or pursuant to the specific product or service's leadership. [enter Company name] is looking to move away from this type of approach to a more consolidated state among creative agencies.

4) Service Requirements:

Service Requirements Insight [delete italics and replace with your information]

Provide a list of requirements agencies can turn to for an easy go-to list to ensure all components are considered when submitting bids.

Service Requirements Sample

- a) Account management*
- b) Global project lead*
- c) Planning Director*
- d) Strategy Director*
- e) All [services/product] (work with stakeholders and SMEs here)*
- f) Personnel*
- g) Tactical day-to-day*

- h) *Strategic approach and execution*
- i) *Timelines*
- j) *Technologies*
- k) *Software*

Your agency must be an established leader with expertise and capabilities in:

- a. global and domestic media planning and buying;
- b. managing accounts in excess of XXX million.

(Enter Company name) seeks a qualified company to provide:

- a. Strategic research and market insights: marketplace and/or landscape insights, budget allocation, market prioritization, and channel mix recommendations
- b. Media buying offline and online media with strategic and cost-effective planning, buying and audits
- c. Data & Analytics: including media market and target group insights for planning purposes as well as reporting on media activities and performance
- d. Paid Search and SEO: should be outlined separately
- e. Paid Social
- f. Innovation: insights on emerging trends and new media to reach Gilead's target
- g. Ongoing delivery of thought leadership and training for Gilead
- h. Consistent and efficient stewardship of programs
- i. Budget and cost management
- j. Post-buy auditing and reconciliation of media programs
- k. Compliance with third-party audit of media billings and reconciliation

Please provide and end-to-end timeline in conjunction with the required timelines as set [below] in the RFP

5) Current/Future Resources Structure:

- a. Our brand areas have current relationships with several global media agencies for national media planning and buying.
- b. Our 2019 budget for the services and/or activities contained within this RFP is \$xxx_____ million annually. Our investment is likely to increase in subsequent years.
- c. Our 2018 media budget is stratified as follows:

Brand Area	Percentage of Spend	Media Type

Resource Structure Insight [delete italics and replace with your information]

Provide a list of current resources as well as future resource requirements to provide agencies with information regarding personal involved with the product or service.

- a) *Current services personnel*
- b) *Leadership*
- c) *Project managers*
- d) *Supporting personnel*
- e) *IT infrastructure*
- f) *Facilities infrastructure*

Resource Structure Sample

Please see the list below for all [agency's] existing resources supporting [enter service/product] as well as future planned resource allocation.

- a) *Account Manager: 1 FTE*
- b) *Account Planner: .5 FTE*
- c) *Director of Strategy: .25 FTE*
- d) *Traffic Manager: 1 FTE*
- e) *Finance lead: 1 FTE*
- f) *Digital Creative Team: 5 FTE*
- g) *Media Relations: 2 FTE*
- h) *Production Associate: 3 FTE*

6) Countries of Operation:

Countries of Operations Insight [delete italics and replace with your information]

Provide a list of countries and employee counts for each to provide the agency insight into your agency's applicable geographic footprint.

Countries of Operations Sample

Countries of Operation (Number of Employees)			
<i>Bangladesh (45)</i>	<i>France (230)</i>	<i>Japan (50)</i>	<i>Russia (15)</i>

Brazil (167)	Germany (50)	Mexico (65)	Thailand (55)
China (55)	India (325)	Nigeria (30)	Turkey (30)
Egypt (37)	Indonesia (75)	Pakistan (40)	UK (125)
Ethiopia (21)	Italy (51)	Philippines (300)	US (3,250)

7) SLAs, KPIs, Metrics:

SLA, KPI, and Metrics Insight [delete italics and replace with your information]

Communicate required SLAs and metrics in the RFP as applicable to accurately for scope and the products relevant to this RFP. An option here is to add high-performance or incentive targets which are incremental service offerings above what stakeholders have required. Ensure costs are understood to reach standard SLAs as well as high-performance targets to gauge cost ratios to service deliveries. If unknown, ask the agencies to provide recommended SLAs.

SLA, KPI, and Metrics Sample

SLAs may be proposed by your company or left open for the suppliers to provide within the RFP.

Please see the SLAs and metrics which will be used to govern this program. These metrics have been reviewed and approved by all stakeholders.

SLA	Measure Definition	Service Default	Incentive	At Risk Fees/Incentives
1	Marketing Qualified Leads	4,000	2%	2%
2	Sales Qualified Leads	7,500	1%	1%
3	New Customers	1,500	3%	3%
4	Sales Opportunities	10,000	2%	2%
5	Monthly Revenue from Marketing Leads	\$2,800,250	7%	7%

8) Questionnaire:

Questionnaire Insight [delete italics and replace with your information]

Deliver the most comprehensive list of questions possible for Procurement and key decision makers to adeptly understand the agencies, their approach, and service deliveries in a side-by-side model which promotes specificity, organization, and decision making in the RFP bid analysis process.

Questionnaire sample:

Agency Information:	1. Please describe your organization and management structure, particularly with respect to your creative service offerings. Please include primary locations and key contacts who will be supporting [enter Company name].
	2. How does your agency provide an operational competitive advantage over your competitors?
	3. Describe any significant relationships your agency can offer regionally with reference to the scope of this RFP.
	4. Is your agency currently or expecting to be involved in any mergers or acquisitions which will have any impact creative services offering?
	5. Is your agency categorized as a small or diverse business?
	6. How does your agency weigh the satisfaction of its employees to operational results and failures? Please provide detailed examples.
	7. Please describe your global capabilities and relationships which differentiate you from other agencies.
Media Offerings:	1. Please describe your agency structure and client management interface specific to [insert Company name] business units outlined above
	2. Specify the name, title, address, telephone number, fax number, and email address of each person authorized to contractually obligate your agency.
	3. Identify the name, address, telephone number, fax number, and email address of the contact person for technical and contractual clarifications throughout the evaluation period.
	4. Describe your experience with [enter Company name]'s industry here.
	5. Describe your agency's significant strengths as it pertains to the details set forth in this RFP.
	6. Please provide an overview of the actual team that would work across the business, including names, roles/titles, background and relevant industry experience
	7. Please describe how your agency provides _____ industry training to your team members?
	8. Please describe the process for collaboration between divisions within the agency
	9. Please provide an overview of your agency's search capabilities from strategy through buying and measurement
	10. Please outline your agency's data sources, tools and technologies that would deliver return on investment in SEM/SEO for [enter Company name].

	<i>11. Please showcase how your agency would develop and execute a strategy for (enter Company name) to maximize online visibility, efficiency and effectiveness for [enter Company name]'s brands through Paid Search and SEO approaches</i>
	<i>12. Please provide an overview of Agency's leadership team, background and experience specific to Search.</i>
	<i>13. Please provide current major client names, locations and activities for each, as well as longevity of relationship</i>
	<i>14. Account planning and research disciplines are critical aspects of this Scope of Work. Briefly describe your agency's commitment to, competency in, and relevant processes to both disciplines.</i>
	<i>15. Please provide a list of research tools and access to tools that you use to assist in the media planning/buying functions.</i>
	<i>16. Please describe your philosophy and approach to media strategy, planning and buying.</i>
	<i>17. Please describe your key differentiating factors as compared to other global media agencies including buying power and rankings.</i>
	<i>18. Please provide two case studies that demonstrate your agency's media planning expertise and showcases how your teams have delivered innovative media platforms to clients. You can attach separate files.</i>
	<i>19. Please provide your documented procedures for managing global accounts</i>
	<i>20. Please describe how our account will be supported globally if/when we decide to incorporate our non-US. offices.</i>
	<i>21. Define how the supporting teams will manage strategic and tactical duties, including who will provide strategic leadership.</i>
	<i>22. Provide the number of other accounts our main point of contact and/or account manager will manage.</i>
	<i>23. Please describe your communication model with other clients including frequency of communications, elevation protocols for issues that arise, etc.</i>
	<i>24. Please describe your ideology and approach to media planning.</i>
	<i>25. Please explain how you provide budget allocation, strategic media mix guidance and market insight into planning recommendations.</i>
	<i>26. Please describe your capabilities for digital media including online video, and paid search.</i>
	<i>27. Please describe your tactical process for digital planning, buying and approvals, etc.</i>
	<i>28. Please describe your capabilities for offline channels including television, outdoor, and print</i>
	<i>29. Please describe how you establish goals and benchmarks for awareness campaigns across all digital and offline channels. Please</i>

	<i>provide examples of how you have executed against awareness campaign goals for other clients.</i>
	<i>30. Please describe how you provide guidance on new media or emerging trends for your clients.</i>
	<i>31. Please describe your approach to working with your client's creative AOR.</i>
	<i>32. Please outline your approach and philosophy to your investment in and development of your team members.</i>
	<i>33. Please describe how you strike the "right" balance between the number of people, automation, and how you don't add too many touches which only creates additional overhead.</i>
	<i>34. Please describe your agency strategy for print. We view print as more than just a journal ad.</i>
	<i>35. Please explain your relationship and how you work with the networks and other partners.</i>
	<i>36. When you look at and think about a brand lifecycle, how do you go about resourcing your support on brands of different sizes? (some brands are being launched while others are moving toward discontinuation).</i>
	<i>37. Please describe how your agency manages a franchise vs. a brand? Please provide some examples.</i>
	<i>38. How do you scale up and scale down within a brand area?</i>
	<i>39. As it relates to innovation, please describe what makes your agency a leader. What are you doing within Media that makes you a leader?</i>
	<i>40. Please tell us how you evaluate your partners?</i>
	<i>41. Please describe your staff turnover by job level and how you measure it.</i>
	<i>42. Please describe your agency's process as it relates to a potential competitor conflict. Please also explain how this process will work at the Agency level and among the other agencies within the holding company.</i>
	<i>43. How does your agency manage and ensure transparency in buying including but not limited to rebates, data, tech fees, etc.?</i>
Account Service Support:	<i>1. Please describe and detail a full end-to-end implementation process including, but not limited to, resource availability in [enter required timeline here], an implementation timeline with samples from previous clients, roles, responsibilities, and expected level-of-effort from both your agency and [enter Company name].</i>
	<i>2. Will the IT implementation team be centrally located or local? Please detail global limitations and opportunities (if applicable).</i>
	<i>3. Can you guarantee go-live by xx/xx/xxxx</i>

	<p>4. Describe a comprehensive service operation for [enter Company name] regarding global hours of operation, call centers, dedicated resources, language restrictions, on-shore/off-shore resources, quality control, responsiveness to operational queries and escalations, QBRs, and other operational account governance.</p> <p>5. Please confirm your agency's ability to support all countries as listed in this RFP and outline any existing or potential service constraints.</p> <p>6. Please provide overview of critical SLA/KPIs where possible and how they're utilized to drive a best-in-class program. Additionally, please describe how your company plans to meet the SLA/KPIs listed in the scope section of this RFP.</p> <p>7. Is any portion or all program administrative responsibilities outsourced? If so, please provide supplier(s) and detail the management of the applicable supplier(s). Will [enter Company name] be notified of outsourced suppliers?</p> <p>8. Though not required at this stage, if so desired by both parties in the future, do you have resources available to administer the program for [enter Company name]?</p> <p>9. Please provide the implementation project manager(s) and their brief resume (both in industry and with your company) who will service our account. If selected, [enter Company name] will ask for your company to lock-in this resource pursuant to the executed SOW.</p> <p>10. Do you have dedicated tools provided for our Program Administrators? Provide best practices around service policies and procedures. Please detail the system, compatible browsers, and their reporting capabilities. Is a test environment available?</p>
<p>Systems, Integrations, and Reporting</p>	<p>1. Pursuant to the detailed scope of this RFP, please describe, in depth, how your systems will interface with [enter Company name] [enter ERP or other required systems here]. If we're to access your web-based portals, are you able to customize your site with [enter company]'s logo and other specific requests?</p> <p>2. Will [enter Company name] require any augmenting or new technology to enable automation or integration?</p> <p>3. Based on the information of this RFP, will customized programming be required to accomplish any integrations?</p> <p>4. Please confirm any web-based platforms are compatible with Chrome and IE</p> <p>5. Information Security/Data Privacy – Please list all applicable certifications</p> <p>6. What type of customizations do you allow for your platform?</p>

	7. <i>How does your company handle Production and business-level IT support? Do you have a case management system? How are priorities assigned?</i>
	8. <i>How often does your company release new code into the platform? Are release notes shared with customers prior to releases in the event there are customer customizations?</i>
	9. <i>Are management reports available from a secured web site? Describe how reports can be customized by category, person, department and other common metrics. Will your company be able to provide a demo as well as samples of available reporting?</i>
Technology Support & Disaster Relief	1. <i>What technical support is available for your technology and reporting packages and what hours is technical support available? Can data be consolidated on a global scale?</i>
	2. <i>Provide an explanation of the support structure for issue escalation in your IT organization.</i>
	3. <i>Will [enter Company name] be provided with a permanent test environment? What is the testing support for clients when client has a system change or updates (IE Oracle)? What is the testing support for clients when client has a system change or update to platform(s)? How much advanced notice must be provided for dedicated IT testing support?</i>
	4. <i>Describe your IT infrastructure.</i>
	5. <i>If applicable, does your agency provide mobile applications?</i>
Contract & Pricing	1. <i>Please see the Master Services Agreement for this engagement [attached] and return review and edits with your RFP submission.</i>
	2. <i>Please confirm the proposed pricing to [enter Company name] is that which is offered to your top-tier customers.</i>
	3. <i>Please review and fill-out the rate sheet [attached] and return with your submission of the RFP.</i>
	4. <i>How can [enter Company name] maximize its financial incentives and positioning based on the known requirements of this RFP?</i>
Risk	1. <i>Are there any changes or modifications to the current business model and offering which would alter delivery of [services/product] to [enter Company name]?</i>
	2. <i>How do does your agency manage risks to the organization and customer base?</i>
	3. <i>Please provide your Dun & Bradstreet number:</i>
	4. <i>When risks are discovered within your agency, how quickly do you provide feedback to your customer base?</i>

Quality	1. <i>How does your agency measure a seamless and customer-friendly implementation (where applicable)?</i>
	2. <i>Once implemented/integrated, how does your agency measure a successful customer over a three-year engagement?</i>
	3. <i>How do you maintain excellent customer service and account support? Please provide examples.</i>
Innovation	1. <i>Please outline any innovative strategies your agency has implemented in the past three (3) years and what innovations are in pipeline for the coming three (3) years.</i>
	2. <i>How does your agency measure internal innovation to that of your closest competitors?</i>
	3. <i>Are test environments made available to [enter Company name] prior to upgrades?</i>
	4. <i>How does your agency integrate innovative upgrades without impacting the customer's current day-to-day business?</i>
Cultural Fit	1. <i>Based on your understanding of [enter Company name] culture and vision; how will you company align with our core values and people?</i>
	2. <i>What does your ideal customer look like?</i>
	3. <i>From a cultural and internal personnel standpoint; how is your company cultivating itself and investing in its people? What is your five (5) year plan?</i>
	4. <i>Please define your company's communication approach and service process in detail.</i>
	5. <i>What have been the results of your most recent employee satisfaction/engagement surveys?</i>
References	1. <i>Please provide a minimum of three (3) customer references who are of like size and scope as [enter Company name].</i>
	2. <i>Please provide one (1) potential customer reference who engaged your agency in the RFP, however, did not award your agency.</i>
	3. <i>Please provide one (1) reference of a previous customer who has left your agency in the last twelve (12) who was procuring the same services as [enter Company name].</i>

9) Pricing/Rate Sheet:

Pricing/Rate Sheet Insight [delete italics and replace with your information]

Set a specific rate sheet can be beneficial for agencies to provide bids. This is also advantageous to the key decision makers at it provides a side-by-side costing analysis of services. An approach to consider is to eliminate a rate sheet and allow for agencies to provide a cost structure which they believe will be a best fit for the organization. In this approach, ensure normalization of bids is possible.

Pricing/Rate Sheet Sample



Pricing
Worksheet.xlsx

10) Timeline

Timeline Insight [delete italics and replace with your information]

Create an in-depth RFP timeline with coordination from all stakeholders (BU, IT, Legal, etc.). This will provide significant advantages in maintaining timeliness, strong engagement and project management.

Timeline Sample

Please review the RFP timeline (below) and contract [RFP owner] with any questions or concerns.

Action	Date	Accountability
NDA signed and returned	xx/xx/xxxx	Agencies
RFP Document Issued	xx/xx/xxxx	Company
Intention to Participate	xx/xx/xxxx	Agencies
RFP clarification Deadline for Agency questions received	xx/xx/xxxx	Agencies
Q&A Calls	xx/xx/xxxx - xx/xx/xxxx	Agencies & Company
RFP Submission Date	xx/xx/xxxx	Agencies
Agency Pitches - On/Off Site	xx/xx/xxxx	Agencies & Company
Down Selection of Shortlist Agencies	xx/xx/xxxx	Company
Discussions with Shortlist Agencies (potential requirement for site visits)	xx/xx/xxxx - xx/xx/xxxx	Agencies & Company

Contract and Pricing Negotiation	xx/xx/xxxx – xx/xx/xxxx	Company
Award	xx/xx/xxxx	Agency & Company
Planning	xx/xx/xxxx – xx/xx/xxxx	Agency & Company
Kick-Off Implementation	xx/xx/xxxx	Agency & Company
Go-Live	xx/xx/xxxx	Agency & Company

11) Terms and Conditions

Work with your Legal department on a comprehensive list of terms and conditions for RFPs to ensure all liabilities are covered. [delete italics and replace with your information]

- a) *This RFP is for discussion and evaluation purposes of the contemplated transaction only. Submission of a response to this RFP is expressly conditioned upon agency's agreement to the terms set forth herein. For clarity, this RFP or any response from Partner to this RFP shall not constitute a binding agreement until agency and Company have duly executed one or more definitive agreements. Company and the agency shall be bound by the terms of the mutual confidentiality and non-disclosure agreement entered between the parties.*
- b) *Company reserves the right to accept other than the apparent lowest priced proposal and to accept or reject any proposal in whole or in part or reject all proposals with or without notice or reasons. Company may amend, supplement, or withdraw the RFP at any time.*
- c) *All answers to this proposal must be numbered as per the corresponding number of each question and must follow the same format as this RFP.*
- d) *Quantities stated in this RFP are for informational purposes only and shall not be binding on Company. Such information supplied by Company is for the convenience of the respondents only and Company makes no warranty regarding the accuracy of any data or information provided.*
- e) *Any costs incurred by a respondent to this RFP in connection with the preparation or submission of a response or any other expenses attendant thereto are the sole responsibility of that respondent and neither Company nor any of its business units, affiliates or subsidiaries has any obligation, under any circumstances, to reimburse or otherwise compensate the respondent for expenses so incurred.*
- f) *Respondent shall not issue or cause the issuance of any press release or other publication of the existence of this RFP without the prior consent of Company.*

- g) Respondent shall not publish photographs or articles, make speeches about, or publicize the existence or scope of any agreement resulting from this RFP without first obtaining prior written consent from Company.*
- h) The preparation of a response to this RFP shall serve as evidence of the respondent's acceptance of the terms contained herein.*
- i) If a respondent should decline to offer a proposal, all materials and information received pursuant to this RFP shall be promptly returned to Company and any copies made thereof shall be immediately destroyed.*
- j) This RFP, all information contained herein, and all Company specifications and samples provided herewith shall be considered Company confidential information and subject to the mutual confidential disclosure agreement by and between respondent and Company.*
- k) All suppliers receiving such documents shall use them solely for responding to this RFP.*
- l) The information contained or referred to in the RFP is not to be used, disclosed or released for any other use or purpose and must be returned to Company or destroyed when requested.*

III. Supporting RFP Materials

A) Supplier List

Enter agencies in the tracker (below). Organizing agencies and their profiles will assist with communications as well as on-going negotiations throughout the RFP.

Agency	Agency Contact	Contact Phone	Contact Email	NDA Signed	Current Agency	Current Agency Spend	BU's Supported	Agency Risk
1	John Doe	(xxx) xxx-xxxx	@Agency.com	Y/N	Y/N	\$0.00	Marketing, HR, etc.	Low, Med., High
2								
3								

B) RFP Assessment

Partner with all key decision makers to determine scoring criteria and associated weights. Aggregate scoring from all stakeholders and present the findings. This will provide talking points, maintain engagement and generate an award output for the agency who scores the highest which will greatly assist in the decision-making process. The worksheet (below) is preconfigured for an assessment.



Supplier
Assessment Worksh

IV. About Blackline Group

Blackline has been helping companies overcome critical procurement issues for more than a decade. In that time, we've helped some of the world's largest companies transform more than \$100 billion in total spend.

Blackline's agile approach aligns with customer's desire for easy to consume improvements. The results speak for themselves; our clients are consistently awarded top industry honors for setting the bar in Procurement.



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