RFP Best Practices for Companies and Brands

A quick guide for communications, marketing, and procurement leaders

Run a better agency search.

A clear, focused request for proposal (RFP) saves your team time and helps you choose the right agency.

1 Align internally before you start

Confirm the business need, approved budget, decision-makers, and schedule. Agree on what success looks like and how agencies will be evaluated. Make sure your selection team can stay involved throughout.

2 Keep the shortlist focused

Research agencies with the experience and capabilities you need. As a guide, invite 4–5 agencies for an initial credentials review, then 2–3 finalists for full proposals and presentations.

3 Write a brief agencies can act on

Specify the problem, audience, desired results, scope, and budget or budget range. Include relevant background, submission requirements, evaluation criteria, and any non-negotiable terms, such as payment timing or location requirements.

4 Give agencies time and access

Allow at least 3–4 weeks for a full proposal. Offer individual Q&A sessions with decision-makers so agencies can ask candid questions. Honor your schedule and communicate changes promptly.

5 Make the pitch useful

Keep the same decision-makers involved and meet the proposed agency team. Reserve at least 30 minutes for Q&A. Ask how AI will be used and where senior judgment is essential. Score against agreed criteria; avoid adding substantial unpaid work after presentations.

6 Close the loop

Notify every finalist and offer specific, constructive feedback. A clear conclusion respects everyone's investment and preserves relationships.

Check your RFP before you send it

Use the PR Council's free Auditor to evaluate your RFP against our industry best practices.

Download the AI custom skill or ready-to-use prompt →

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