

# **Building Connections: How to Write a Top-Quality RFP When Building a Social Networking Platform**





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Associations are all about connecting members with the tools they need to do their jobs. Every day, you connect members with educational opportunities, advocacy tools and professional services. More and more, there is another facet to connecting that encompasses almost everything your association does: connecting members with each other. A comprehensive social networking strategy is required for any association that wants to foster community among members and allow them to interact with each other online and share their knowledge.

If you don't have a robust social networking platform (or any at all), it can be difficult to know where to begin. Like most projects, of course, it begins with the request for proposal (RFP). But what should be in that RFP in order to get the highest-quality responses? How do you narrow down the list of potential vendor candidates once the proposals are in? What are the "must haves" to look for?

Every organization has its own unique needs. This paper provides an overview of the major issues involved in issuing and evaluating the RFP that will eventually lead to your social networking platform.

### Phase I: Preparing to Write the RFP

Do Your Research. Obviously, no organization would implement a social networking platform if it is not going to be an effective tool for its constituents. Before you engage with a vendor, consider surveying your constituents about their interest in social networking. Here are some questions to answer before moving ahead:

Is there a demand for social networking among your constituents?

How involved are your constituents in social media outside your organization?

What can the social network do for your constituents? What need have they identified that an online community can fill? How was that need identified?

Will you invite non-members? If yes, why? If not, why?

What and how many networks do you wish to establish? How do your members want to communicate with each other – by region? Specialty? Chapter?

Define Your Strategy. Before your organization can begin implementing a social networking platform, you must decide on the strategy for your online community/professional network. A few things to consider:



- What do you want the network to do? Is it primarily to create engagement? Increase revenue? Gather intellectual property and share knowledge? Provide a way for securing donations?
- What does a successful online community look like to your organization? How will you define success? How will you know the social network is doing what you want it to do?
- Know why you want to build an online social network. Why is it important for your organization to have its own venue for social networking? Is it something your members have asked for? Does another online community exist for your industry that may attract your members?
- Do you currently have a social media strategy? How will the social network complement your current strategy? Consider a rollout plan and who will manage the network. Do you have the staff resources to make sure that the community is a success?

## Phase II: Writing the RFP

Write a Powerful Executive Summary. The executive summary is your chance to make a first impression. Many potential vendors will decide from the opening summary whether your project is a fit for their product and service offerings. While it's true they are the vendor and you are the potential client, you still want to attract the highest-quality bidders to ensure the highest-quality product. Keep in mind that this caliber of bidder probably is in demand already, so use the executive summary to show why your project is one they want to take on.

Explain Why This Project Is Important. Provide background information about your organization and why it is seeking a professional network. Outline your strategy for the network and include features that you will want built into it, such as document-sharing, message boards, blogging capabilities, etc. Keep this section very broad; the details will be explained later in the RFP.

Define Your Target. Include as much demographic detail as you have available. What is the age breakdown of your users? Can you provide an overview of their professional profile? How do they access your site (computer, handheld device, etc.)? Are they heavy Internet users or only sporadic?

Be Clear on the Administrative Requirements.

Outline the key dates related to the RFP, including dates for product demos, the timeline for making a decision and when the social network should be launched.



# Writing a Social Media RFP

Identify the key contact person for the RFP process. State how you wish to be contacted (email or phone). The contact person should be able to answer questions the vendors may have regarding the RFP.

Describe the criteria for RFP evaluation. This might include meeting the requirements as stated in the RFP, understanding of the work to be performed, technical approach and methodology to accomplish the work, pricing, completeness and competence in addressing the scope of work.

Define the Scope. Make this section clear and detailed. Be sure to include everything you want the platform to do, both now and in the future. What are the core requirements and objectives?

Make the Requirements Clear. Outline succinctly which key product elements and services you believe are essential to the success of your project. At this time, include only major requirements such as:

- Peer Groups
- Activity feeds (i.e., chronological stream of community member activity so everyone can keep up with what's happening in the community, to the minute)
- Individual blogging capabilities
- Ability to brand the platform with your own look and feel
- Searchable resource library
- Full member collaboration around a video, research document or other type of group activity that is not offered on Facebook
- Discussion lists
- Photo and video Libraries
- Wikis
- Survey and polling
- Rating content
- Member matching
- Content tagging



- Friend requests
- Searchable, interactive profiles
- Ability to connect with those with similar interests
- Integrations to public communities like Facebook, LinkedIn, Twitter, YouTube, etc.
- Domain masking
- Incorporation of your brand and graphics
- Global enterprise-search functionality
- Invitations can be sent outside of the community asking people to visit and register
- Services like hosting should be included along with descriptions of the vendor's service level agreements, security, back-up, 24x7 monitoring, and Internet connections.

Be Specific about Infrastructure and Integration. Explain your current association management system (AMS) and content management system (CMS), and be sure to indicate whether there will be changes to this infrastructure within the next two years. List other technologies that your organization uses. The vendor should clearly state how its product will integrate with your current system and, if applicable, any future systems. Vendors also should state what experience they have, if any, integrating with your AMS or CMS.

How Much Help? Determine what support, if any, you will need from the vendor. This requires an honest discussion within your organization about how prepared the staff is for social media integration. Are they tech-savvy or do they require a lot of guidance? Are they active in social media already, either on their own or through the organization? Are they excited about the initiative and eager to support it? Or are they wary of adding more responsibilities to their jobs and concerned they won't catch on?

Once you know the answers to these questions, and you have an honest profile of your organization's technical needs, you can assess what support you need from the vendor. Some questions for the vendors:

- ✓ What is the support during the implementation? How will the vendor handle individual staff training and follow-up questions?
- ✓ What support will the vendor provide after the social media platform is in place?
- ✓ What format will that support be — telephone number? E-mail? Live chat?



- ✓ Is there a limit to how many calls/e-mails your organization can send requesting help?
- ✓ What is the protocol for technical problems on the vendor's end? Will you have an after-hours number to call or e-mail?
- ✓ What is the turnaround time for technical problems?
- ✓ Is there a tiered system of billing based on how much post-implementation support you wish to have?

Don't Be Shy. Ask the vendors any questions that may come to mind. If they don't know the answer, ask them to provide it within 72 hours. Some questions to keep in mind for vendors:

- How will their solution meet the needs of your organization?
- What is the background of the senior management? What is the background and technical/professional expertise of the primary person who will be assigned to your organization?
- What is the total number of staff? How many will be devoted to this project?
- Are there opportunities for co-marketing? How could the bidding company work with your organization to generate business for both of you?
- Who are your references?
- What do you propose as the project timeline, from information-gathering to implementation?
- What is your experience with our AMS, CRM and/or CMS?
- What is your quality assurance and testing methodology?
- What is the process for training your staff in the social media platform? Will there be documentation of the training for later reference?
- Will the vendor provide an outline of pricing for design, implementation, integration, migration, licensing and maintenance?
- Will the vendor provide sample agreements?





## Phase III: Demonstrations and Selection:

Ask the vendors to follow demonstration scripts so you can make an exact comparison of the vendors and their capabilities. Make sure there is a process for evaluation by the staff. Identify the key criteria for selection.

## Things to Remember

Research indicates long, overly complicated RFPs almost always receive fewer and lower-quality responses. Put together a strong, workable document and be as succinct as possible. Try to eliminate non-essential sections and/or requests that tend to drown out a focused, clear and logical reply.

The vendor should demonstrate knowledge of both your mission and your members. Does the vendor understand how you and they work? Will your community empower your members to connect and communicate?

Be open-minded and flexible. Vendors often develop creative solutions your organization may not have considered. New approaches to old problems can help reduce the project timeline and save resources.

## Conclusion

A strong RFP is the key to attracting quality vendors for your organization's social networking platform. There must be detailed research into what you and your members need, followed by a well-written RFP and then a comprehensive review of the proposals. The tips in this document are designed to guide you and your organization through all phases of the process so you can arrive at the best member engagement solution.



## About The Authors



Founded in 2005, .orgSource is a recognized authority on association Web site and other online media strategies. Working with numerous associations including the American Dietetic Association, American Society of Anesthesiologists, Emergency Nurses Association, American College of Foot and Ankle Surgeons and dozens of others, .orgSource has extensive expertise in Web site management, association strategy, online education, social media, writing for the Web, search engine marketing and technology deployment.

Serving in key leadership roles for associations, President, Sherry Budziak has particular expertise in Web site strategy and administration, technology planning, project management, marketing and strategic planning. Prior to launching .orgSource, Sherry was associate executive director of information technology and Web services for a major medical association and chief operating officer of its subsidiary Internet company, which solely focused on associations.

.orgSource is an active participant in the association community as a knowledge expert and frequent authors and speakers for the Association Forum, the American Society of Association Executives and Digital Now.

You can view client testimonials at <http://www.orgsrc.com/testimonials.html> and on LinkedIn at <http://www.linkedin.com/in/sherryb>.



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