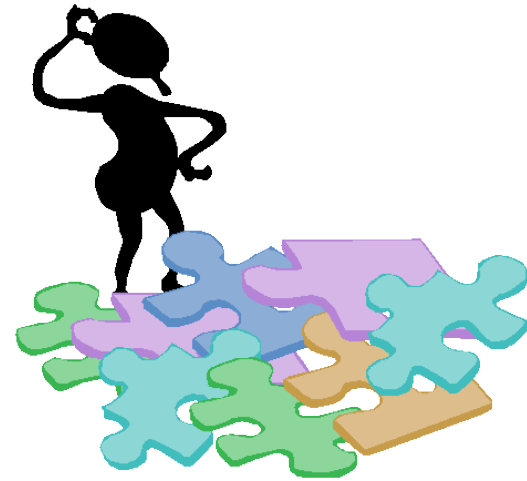


Building Connections: How to Write a Top-Quality RFP When Building a Social Networking Platform



Preparing

Preparing to Write the RFP



Getting Started

What are you trying to accomplish?

Do you know your customer?

DO YOUR RESEARCH



Keys to Success

- ❖ Survey your members and go beyond the “member satisfaction survey”
- ❖ Don’t design for the masses—the social network is truly for the few
- ❖ Know what the customer needs now and where you want them to grow/go to





Pain Prevention

- ❖ Launch to the people that will use the social network right now—are they different from those that have buying power?
 - ❖ Starting with established groups that already have set processes is the hardest. Start with a group that has a blank slate first for an easy win.
-

Getting Started

No matter what the technology is, a successful project will be one that has a **DEFINED STRATEGY**





Social Network Positioning Statement

- ❖ Write one for yourself!
- ❖ Our social network named {name} will be the only website to provide {differentiator A}, {differentiator B}, and {differentiator C} to {target audience} to allow our organization to {value}.

Our social network named Connections will be the only website to provide an interactive directory of field experts, a knowledge center, and an industry futurist group for professional coal mining engineers and companies that support coal mining to allow our organization to be the recognized center for coal mining innovation in the U.S.A.

Steps to Building a Social Media Strategy

- ✓ Your audiences (current and potential)
- ✓ Your objectives
- ✓ Your overall message
- ✓ Your offering and differentiators
- ✓ Your network champions
- ✓ The process, structure and resources
- ✓ The platform(s)





Writing the RFP

Writing the RFP

Writing the RFP

Write a powerful executive summary
Explain why this project is important
Provide information about your company
PROVIDE DETAILED BACKGROUND





Keys to Success

- ✓ Identify who is driving the social networking initiative (Board-directed, membership, etc)
 - ✓ Clearly identify what you are trying to achieve
 - ✓ Clearly identify your commitment to undertaking social networking
 - ✓ Clearly identify resources that you do/do not have for the project and beyond
 - ✓ Clearly identify your governance/membership structure
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Pain Prevention

- ❖ Dedicate resources to project management and idea creation on your side (consultant or in-house staff)
 - ❖ Be ready for change management!
 - ❖ Have realistic expectations—you aren't building a plane, you are building an airport!
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Writing the RFP

Clearly define requirements

Be specific about infrastructure

Make sure they have experience with your
AMS/CRM vendor

**ENSURE REQUIREMENTS ARE
DEFINED**





Keys to Success

- ❖ Ramp up on writing business requirements for software
 - ❖ Really understand the difference between “must have” versus “nice-to-have”
 - ❖ Work with vendors and consultants that *really* know the systems—are they partners? Offer pre-built integrations? Documented APIs for purchase?
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Pain Prevention

- ❖ Ensure you know your own data
 - ❖ Ensure your data conforms with typical structures outlined by your AMS/CMS provider; clean it up if it does not or expect customizations if you can't
 - ❖ Know how your AMS/CMS' login and security system works—see it in action and don't make up scenarios in your head!
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Writing the RFP

How much help will you need?
Do you require marketing support?
Do you require technical expertise?
Do you require consulting services?

DETERMINE PARTNERSHIP NEEDED





Keys to Success

- ❖ Two critical parts of social networking integration:
 - technical integration with other systems and marketing integration— be ready with resources for both!
 - ❖ Expect big marketing push around launching of site and then to spend next 6+months gaining user adoption
 - ❖ Plan across organization for how to socially enable current programs!
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Pain Prevention

- ❖ Be realistic in how many people you expect to adopt the network by post-GA at day 30, 60, 90, etc...
 - ❖ Expect to nurture and care for the network
 - ❖ Expect to ramp up numbers of repeat visits/aid adoption through various programs and outbound marketing efforts
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Vendor Selection

Demonstrations and Selection

Vendor Selection

Create demonstration scenarios

Determine your process

Do your due diligence

PROCESS IS IMPORTANT





Keys to Success

- ❖ Split out your various audiences to discuss what you want out of the system, e.g.
 - Chapters
 - Committees
 - Non-member conversion
 - Checkbook member to engaged member conversion
 - Donors by type
 - ❖ Be clear with your vendor the priorities and what is needed for launch versus longer term
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Pain Prevention

- ❖ Be realistic and flexible about launch dates—you aren't going in with perfect knowledge
 - ❖ Write down decisions and rationale—date them! Make sure vendor also has a copy and is in agreement
 - ❖ Don't have a fixed mindset—most everything is fluid in social networking!
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Vendor Selection

Work from a partner perspective
Look beyond feature/function
Evaluate cultural and business
characteristics

FIT IS IMPORTANT





Keys to Success

- ❖ Look for a vendor from a relationship standpoint first and then the technology. Technology change bunny fast, corporate cultures change turtle slow.
 - ❖ Meet as many people as possible from vendor and meet your primary contacts
 - ❖ Understand the full methodology and how it fits with your organization's structure/ learning modes
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Pain Prevention

- ❖ Understand the product roadmap of the vendor
 - ❖ Understand how the vendor's organization works internally
 - ❖ Assess alignment of values/capabilities between your organization and that of the vendor
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Contact Information

For more information contact

Sherry Budziak President
.orgSource
www.orgsource.com

sherry@orgsrc.com
facebook.com/orgsource
[Twitter.com/orgsource](https://twitter.com/orgsource)
[Linkedin.com/sbudziak](https://linkedin.com/sbudziak)

Suzanne Carawan
VP Marketing & Strategy
ThePort Network
www.theport.com

suzanne.carawan@theport.com
[Twitter.com/suzannecarawan](https://twitter.com/suzannecarawan)

