PR Technology

Vendor Selection Guide

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Contents

About the author

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Michael is a London Research writer specialising in digital media and marketing. He was head of content for London Research sister company Digital Doughnut between 2012 and 2016, and during that time edited the European channel of Adobe's CMO.com website. Before that he was editor of New Media Age, the UK's leading news publication for interactive business from 2000 to 2007, and its editor-in-chief from 2007 to 2011. He has written widely about the sector, is a regular speaker in the media and on the conference circuit, and has lectured on the future of advertising and publishing at the London College of Communications.

About us

London Research, set up by former Econsultancy research director Linus Gregoriadis, is focused on producing research-based content for B2B audiences. We are based in London, but our approach and outlook are very much international. We work predominantly, but not exclusively, with marketing technology (martech) vendors and agencies seeking to tell a compelling story based on robust research and insightful data points.

As part of Communitize Ltd, we work closely with our sister companies Digital Doughnut (a global community of more than 1.5 million marketers) and Demand Exchange (a lead generation platform), both to syndicate our research and generate high-quality leads.

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Introduction

PR typically follows the cycle of 'target, capture and analyse'. A campaign starts with identifying and contacting the appropriate journalists and opinion-formers; progress is monitored in terms of mentions and coverage; results are assessed and then fed into the planning of the next campaign. But while this time-honoured process remains in use, almost everything around it has changed.

As the media channels available to journalists and influencers have multiplied, and the means PR professionals use to communicate with them have changed, so technology has been developed specifically to support the PR cycle.

There is now a wide selection of software tools on the market that address all three stages of the communications professional's job.

Targeting
Creating and maintaining a contact list has always been a time-consuming and thankless task. Simplifying that has been a key automation challenge for software companies.

Suppliers now offer databases of relevant journalists and influencers that include their specialist areas, audience reach and recent topics they've covered or discussed. These are allied with functionality that allows users to search in numerous ways, such as by subject, keyword, news and audience interest.

The combination allows PR professionals to build tailored contact lists quickly and easily, for every campaign they run, and to target specialist correspondents as required.

Monitoring
The second key area for automation is monitoring. Human beings with scissors have been replaced with web crawlers searching for keyword mentions. The technology is also being extended to video and audio, although this can currently be unreliable, because the crawlers search the captioning, which is of varying quality.

The other advantage of automated monitoring is that reporting of mentions can be done in near-real time. This is particularly important in crisis management, since it allows flash-points to be identified and addressed almost immediately.

A major area of potential here is the use of AI to recognise not just keywords, but also context and sentiment. This allows organisations to tailor and prioritise their responses based on whether the tone of a piece of coverage is positive or negative. It also allows better planning of future campaigns, improved understanding of audience needs and greater awareness of both industry trends and shifts in consumer behaviours.

Analysis
Businesses know PR works. Research shows four out of five senior marketers believe earned media is more effective than paid for[1]. The problem has been that, until recently, no-one has been able to prove it.

In this regard, earned media has lagged behind paid and owned. The ability to attribute conversions to interactions within the digital space – particularly in the lower funnel – has made it easier to demonstrate ROI from websites and online advertising. In contrast, the benefits of PR tend to be in the upper funnel. Attribution here is significantly harder, so metrics tend to be softer; awareness and brand uplift, views or equivalent advertising value. So, it's no surprise that more than three-quarters (77%) of PR professionals struggle to prove the value of their work to the organisation[2].

1 https://www.prnewswire.co.uk/resources/white-papers/Master-the-Mix-Amplify-Your-Campaign-Results-with-Earned-Media.html
2 https://www.cision.co.uk/resources/white-papers/cision-pr-week-2018-global-comms-report/

It's also no surprise that, as digital tools have been developed for the PR industry, sophisticated measurement and analytics have been a top priority.

PR Manager
Publishing Company

"We're currently judged on the number of mentions we get, but that will move towards reach and sentiment in the future."

Digital tools now allow monitoring to be overlaid with data about how prominently keywords were featured, and how widely each piece of coverage was seen. They also increasingly allow traffic to clients' web properties to be linked to individual earned mentions, and therefore transactional value to be attributed to PR.

These tools are available as integrated suites, or as individual items. You can also buy individual monitoring tools for different channels, for example social media. And all these capabilities are usually bought 'as a service'.

Who should own the technology selection process?
The answer to this question depends on integration. How closely does your PR technology need to work with the rest of your martech stack, particularly analytics software? Does it also need to connect with your other systems, for example business intelligence (BI)?

Some PR teams operate as a standalone unit in technology terms. This simplifies the purchase process and largely removes the need for IT involvement. Typically, the choice of tech will be made by the head of communications with involvement from the head of marketing. Sign-off may also be needed from the financial director (FD) or CEO.

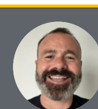
If your PR tech does need to be integrated with other systems, the CTO or head of IT will need to be part of the purchase committee. Digitally mature organisations might also have a Chief Marketing Technology Officer; if so, this person should lead the purchase process.

IT must ensure connectivity, compatibility and security, as well as the alignment of the chosen product(s) with the company's martech strategy. Marketing must ensure they have full control of areas such as workflow management. The CTO and CMO (and their respective teams) should work together to ensure the PR technology meets the requirements of the organisation from both technical and internal user perspectives, as well as providing a high-quality experience for any external partners.

In both cases, larger organisations are likely to require the involvement of the procurement department.

Although this guide is aimed primarily at communications professionals and marketers, it should be read in the context of technical considerations such as scalability and security.

Justin Beddows
Consumer PR Specialist
Admiral Group



"The most important thing for me is media monitoring. We need to know what the media is saying about us and our competitors in as close to real time as possible. Then we need to be able to disseminate that to the important people in the organisation so they can see the coverage we're getting. And we need to be able to create reports based on the coverage, make comparisons – whether that's campaign against campaign, month-on-month, or us against our competitors – not just share of voice but drilling down into the tone of the coverage. And we also look at reactive and incidental coverage."

The vendor selection process

Those selecting a PR tech vendor (or, indeed, any technology vendor) typically need to go through the following stages:

1. Build
the business case for investment;

2. Define
internal requirements;

3. Agree
whether you need a partner to help with implementation;

4. Circulate
Request for Information (RFI) document to the list of vendors;

5. Decide
the shortlist of PR tech vendors;

6. Create
Request for Proposal (RFP) document, and send to shortlisted vendors;

7. Evaluate
the shortlisted vendors;

8. Select
your partner, and sign the agreement and terms.

An effective procedure for completing these steps can help you deliver the following benefits for your organisation:

- Clear understanding of purpose within the organisation.
- Buy-in from internal stakeholders.
- Clear articulation of project scope and objectives to potential vendors.
- Consistent comparison and evaluation of suppliers.
- Selection of the most suitable vendor based on your criteria.

Stage 1

Build the business case for investment

There is no point embarking on a vendor selection process unless you have won the business case for investment.

On the right we have summarised some of the potential benefits of best-of-breed PR technology for your business. The key to success is to apply these generic benefits to your own business objectives and processes, so you can estimate, as accurately as possible, the potential upside in terms of increased capabilities, improved efficiency and reduced risk.

Benefits of modern PR technology

Increased capabilities

- Comprehensive media monitoring in real time, including social media.
- Advanced analytics and reporting, leading to improved industry insight.
- Metrics for earned media comparable to those for owned and paid-for.
- Enhanced awareness of key journalists and influencers.
- Better crisis management.

Improved efficiency

- Automation of routine tasks.
- Media database constantly updated.
- Integration with other martech software.

Reduced risk

- Early warning of potential PR problems.
- Reduced risk of reputational damage.

Justin Beddows
Consumer PR Specialist
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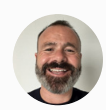

"If we don't know what people are saying about us in the media, there are all kinds of risks from a reputational point of view. It's not difficult to get buy-in when people see that. These tools allow us to see what coverage we're getting, what coverage our competitors are getting, every day, so that we can react quickly if we need to. And if you don't have that information, you're operating in a vacuum."

Stage 2

Define internal requirements

The search for software begins with a thorough understanding of your own requirements. Technology on its own is rarely a silver bullet, so first identify any internal constraints that could prevent you from realising tangible benefits from better software.

First and foremost, talk to the users. Identify who will be using the new technology, and their profiles. Remember to include any external users, such as staff at your PR agency, if you have one. In addition, find out who will want to see reports from the new software, and what their requirements are. Interviews, workshops and surveys can all be used to elicit information about user needs. Consider creating user scenarios or stories that can surface the challenges users are facing, and also the opportunities that better technology could bring. These scenarios will also feed into the RFP document that may be used later in the vendor selection process.

At this point you should establish how closely your PR tech needs to align with your business objectives and your technology strategy. For some organisations, integration with other marketing technology is increasingly important. For others, a standalone solution will be sufficient. In either case, work out whether all your requirements can be addressed by a single supplier, or whether you need to integrate a number of products from different sources.

Consider where your business is going, so that you can choose the right vendor(s) to support you on your journey, rather than making a decision based on needs that might soon be out-of-date. Thinking this way will also help you avoid buying features your teams aren't ready for, or which aren't essential to your progress.

Questions you should be asking at this stage include:

- Do you need to manage multiple languages? How do user requirements vary in different geographical regions?
- Will you need to adapt existing policies/procedures/practices in your organisation in order to support operational changes to the way people work, and to how you use information, processes and systems?
- Which other systems will your PR tech need to be integrated with? What is the lifetime of those systems? Are you considering replacing any of them? If so, how soon and with what?

Stage 3

The Request for Information (RFI)

This is a relatively short document or form that provides potential suppliers with high-level information about your PR tech requirements.

In putting together your initial 'long list', ask your professional network to recommend vendors worth investigating, as well as carrying out desktop research into the more obvious suppliers to gain a good understanding of what is on offer.

Look at online business software reviewing services such as G2 Crowd (Grid Reports) and TrustRadius to find out what customers are saying about their PR tech vendors' technology and broader business capabilities (e.g. customer service).

Buyers can also consult the Digital Doughnut website for background information on PR tech trends, and for whitepapers published by vendors.

Stage 4

Decide the shortlist of vendors

For practical purposes, it makes sense to consolidate your list of vendors as much as possible before sending out a detailed **Request for Proposal (RFP)** document and carrying out more robust comparisons.

At this stage you should be able to weed out unsuitable vendors. They may lack core or specific capabilities that are necessary for your particular requirements, they may not have the necessary business credibility and case studies, or they may not be set up for your type of business.

Making an initial assessment of potential suppliers' professional services capabilities is also highly recommended. Complex implementations can be challenging if you have limited internal resources, or if your people lack experience of handling such tasks. If the relationship is likely to be high-touch, rule out suppliers who don't have an office in your country or time zone.

A powerful tool for comparing products from different vendors is the use case. Rather than just a list of features that you can tick off (or not), your use case instead considers the PR technology as a 'black box'. You don't need to know what happens inside the box. Instead, using the understanding of your internal requirements built up in the previous phase, you look at all possible interactions with this box – involving humans and other systems – and what the outcomes of all those interactions should be. You can then assess vendors on the basis of whether they can deliver all the outcomes you need, based on the inputs and interactions you specify.

Stage 5

The Request for Proposal (RFP): Process & Document

The information below provides high-level information for a Request for Proposal document. This is the culmination of the internal planning work that has scoped out your PR tech requirements so you can find the most suitable vendor.

A full RFP is not always required. At enterprise level, the value of the deal, its scope and the reporting requirements of the business mean this level of attention to detail is mandatory. However, small and mid-market businesses may not have the time or resources required to carry out such vigorous vetting for what is likely to be a significantly smaller purchase. In this case, it's still important to carry out the preparatory work detailed above, since this is your best assurance that the product you choose is right for you.

The RFP process – as distinct from the RFP document specifically – can be used to describe the end-to-end project, starting when you have won the case internally for investment in a PR tech and ending when you have agreed commercial terms with a supplier.

When thinking about the RFP document specifically, make sure you include the following:

- Introduction
- Process and timelines
- Business overview and context
- Detailed requirements, specifications and selection criteria
- Assumptions and constraints
- Budget
- Terms and conditions

Requirements, specifications and selection criteria are clearly intrinsic to this document, and this is where the work you have done internally pays off. You can also include usage scenarios to help you sort the wheat from the chaff.

Vendors should also provide information about their preferred agency partners, if a separate implementation partner is going to be required, and about their product roadmap or digital strategy.

When the document is completed, RFPs can be posted, emailed or posted on your own website or even a third party's.

Note that this document is typically distinct and more detailed than a Request for Quotation (RFQ) which is specifically geared towards making a comparison of pricing based on stated requirements. An Invitation to Tender (ITT) document, commonly used in the public sector, is a more exhaustive document than the RFP. The ITT will thoroughly outline the scope of the project, including both technical and business requirements.

Stage 6

Evaluation of shortlisted vendors

The aim at this stage is to find the vendor which most closely meets your detailed requirements, as defined in the RFP document.

You should invite your shortlisted vendors to pitch their offering and present their software, so you can meet them in person. It may make sense to schedule a day or half-day session when the relevant internal stakeholders can block out time so they are also available.

You should create a requirements matrix that is appropriate for your needs in terms of your chosen criteria for scoring and even the scoring system. This can be completed after you have digested prospective suppliers' RFP documents and seen them demonstrate their software.

Our suggested ten main criteria are as follows:

1. **User experience**
   The quality of the user experience is critical to the success of any PR technology. Not only do users increasingly expect consumer-grade interfaces, but time will be wasted and productivity lost if staff find the system hard to use. Heavy internal users of the technology should be consulted on the attributes they would like to see in a new platform.

2. **Ease of implementation**
   Particularly at a time when businesses are still responding to the disruption caused by the pandemic, the difference between a few days' implementation/onboarding period and one that lasts weeks can be crucial. It's also important to assess how much training staff will require to use the new system across all aspects of your use case, at implementation and in the future.

3. **Integration**
   The ability to integrate PR tech with other technologies within both the department and the wider organisation is likely to be a key success factor for many. Find out how easily you can connect with the rest of your martech stack for measurement and analytics purposes, and whether there are standard APIs or more complicated customisation requirements. Look too at how straightforward it is to connect to systems used by other departments, such as sales or BI. It's also important to see what level of integration is required with the systems used by your partners, agencies, or external contributors.

4. **Access control**
   As with any business software, it's vital to control who has access to your PR tech and at what level. It's particularly important if you work with external partners and contributors, if your work involves sensitive material, or if your PR systems are integrated with the rest of your organisation's systems. Not only do you need to maintain the security of your technology infrastructure – since potential attackers will look for any weak point in your systems to allow them entry – but you also need to maintain the integrity of your communications. Access controls are also a way of streamlining workflows along RACI (responsible, accountable, consulted and informed) principles, meaning that people can fulfil their designated roles but not go beyond them.

5. **Media monitoring**
This is the heart of most PR technology. The crucial balance to strike is between the breadth of monitoring you need, and the speed at which you need it done. For the former, check how wide your shortlisted suppliers' monitoring lists are, which media they include (e.g. print, online, broadcast), how easy they are to customise (e.g. by adding relevant trade publications), and whether they include all the relevant countries or regions. For speed, decide whether you just need regular updates, or whether you need to be kept informed in real time, for example for crisis awareness and response.

6. **Social media monitoring**
Social listening used to be a separate function from media monitoring, carried out to mitigate social media fails and flare-ups, and as part of customer service. But as the role of influencers – paid and unpaid – has grown, so has the argument for integrating social media into a business's overall media monitoring. Is this something your shortlisted vendors can offer? If not, how easy is it to integrate social media monitoring tools with their products?

7. **Analytics, insights and reporting**
The other great advantage of PR tech for communications professionals is that finally they have meaningful data to form the basis for further action. In order to make the most of this, you need to know what analytics tools your shortlisted vendors provide. Can they assess the sentiment of your coverage, how prominent your brand is within it, and what impact it's had? Do they allow you to compare the results of your earned media activities with those from paid and owned channels? Then, once the analysis is complete, what kind of reporting do they allow?

8. **Media database**
How comprehensive is the database of journalists, commentators and influencers your chosen vendor offers? Again, does it cover all the geographies in which your business operates? How detailed and consistent is the information about reach/readership? How frequently is it updated? How flexible is the search functionality – your requirements capture should include detailing the ways your users choose to search so you can ensure they are all supported.

9. **Customer service**
Media monitoring systems need to be carefully configured to the needs of the individual organisation. Many also work in real time. This means the quality of the customer service behind them is key. Check the availability and response times of your shortlisted vendors' customer service teams. How quickly are they able to insert a new search term or a new rule into your monitoring, for example? Will there be someone available to help if things don't go to plan?

10. **Vendor roadmap**
Make sure your chosen vendor has a roadmap that matches the demands of your business strategy and recognises developing technologies — such as artificial intelligence and machine learning. These are already being harnessed for sentiment analysis and rule-based systems. You also need to be certain your vendor is able to respond quickly to changes in consumer behaviour, for example by introducing monitoring of emerging social media channels.

Final thoughts on vendor selection

There is a skill in teasing out whether vendors really have the capabilities they claim, since the choice is not necessarily binary. If vendors are asked to say 'yes' or 'no' when asked about a specific capability, they will typically go for the affirmative option even if that feature has not yet been released (or sometimes even planned).

Read between the lines and make your own call on whether the vendor is suited to a particular requirement. The matrix is a useful tool for assisting your selection process here but should, ultimately, be your servant and not your master.

Scores given for each capability can always be a matter for debate but, at worst, any disagreements and discrepancies will help to further the discussion about what the true critical success factors are.

Stage 7

Select your PR tech partner

Your evaluation of shortlisted vendors and your due diligence should have surfaced the most appropriate vendor for your needs. You can now commence your contract negotiations after any necessary fine-tuning of scope and requirements has taken place. Your procurement and legal teams – if you have them – will be involved to ensure that there are no unwelcome surprises further down the line.

Ideally, there should be a discovery phase to ensure that the terms of the contract are realistic for both parties, and to ensure that the specification document is as definitive and accurately defined as possible.

Vendor scoring matrix

Scores (0-10)

CAPABILITY	VENDOR **A**	VENDOR **B**	VENDOR **C**	VENDOR **D**	VENDOR **E**	VENDOR **F**
1. User experience						
2. Ease of implementation						
3. Integration						
4. Access control						
5. Media monitoring						
6. Social media monitoring						
7. Analytics, insights and reporting						
8. Media database						
9. Customer service						
10. Vendor roadmap						
Total score	0	0	0	0	0	0

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