

REQUEST FOR PROPOSAL

NameWithheld

November, 1, 2017

We have identified your agency as a potential public relations partner, and are inviting you to participate in this PR Request for Proposal. We require a signed non-disclosure agreement in order to respond to our request.

From the agencies that respond to this RFP, we'll generate a shortlist of agencies that will be asked to submit a proposal for a comprehensive integrated PR program to demonstrate their qualifications for an initial six mos. to 1-year engagement.

We will provide additional detail on the program objectives, competitive landscape and industry, go-to-market strategy to the finalists.

PART 1: BACKGROUND

We will begin with an outline of our business.

About NameWithheld (note only a small portion of the website is currently visible)

1. Brief History—built on the idea that healthcare should be transparent, easy. Using real-time data to improve patient care and save lives. NameWithheld is the only digital healthcare platform that provides everyone in the healthcare chain with the tools and real-time data for healthcare that is transparent, efficient and frictionless.

NameWithheld, Inc. is a transparent digital healthcare platform for clinicians, patients, and suppliers that empowers patients to receive the most efficient care, doctors to operate practices more efficiently, and transforms the entire healthcare experience.

NameWithheld's 360° solution combines the latest healthcare technologies with a "Connect to One, Connect to All™" approach that allows providers access to real-time information and enables decisions based on the most appropriate data to save lives.

NameWithheld is a personal healthcare management app/platform that allows patients to book a doctor, read reviews, order prescriptions, share records, connect biomedical devices all in one place in real time for fast, efficient healthcare.

NameWithheld is a practice improvement app/platform that helps doctors fill open appointments, pre-screen patients, access patient records and biometrics, complete compliance documentation and market themselves 24/7.

2. Locations
Our physical office is located in Overland Park, Kansas. We also have a large staff presence in various cities across the U.S.
3. Leadership Team
Confidential. All top leadership have been involved with other Healthcare companies, spanning 30 plus years.

Capabilities and Products/Services:

1. Online patient portal (search for a doctor, write reviews, book a doctor instantly online or in person, house all medical records and data, including wearables. (This site is not currently visible to the public).
2. Doctor and supplier portal where doctors can accept patient appointment requests either online or in person, compliance software for Medicare documentation, access to patient records, data, other practice improvement tools, such as pharmacy prescriptions. (Only the homepage is available to the public)
3. Compliance software
4. Health info/news
5. Patient and Doctor apps

Key Differentiators:

1. Only service that encompasses the entire healthcare chain
2. Uses data in ways than no others are (real-time data for instant monitoring,
3. Uses all the latest available technologies and will continually add more
4. Other (confidential)

Competitors:

Note: there are no competitors who do all that we do, but the following do some of what we do:

Reviews only: RateMDs Vitals Healthgrades CareDash Top Doctors Yelp WebMD Google Reviews Angie's List	Find a Dr./Reviews & Book: ZocDoc Solv: Doc ASAP HealthLine/Dr.co	Telemed/Find a Dr: Teledoc MeMed iCliniq AmericanWell MDLive Dr. on Demand Live Health Online VirtuWell HealthTap HealthExpress PlushCare	Medical Records: Mymedical Info Compliance DME Evalumate
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Recently Launched New Products and/or Services:

1. Doctor portal for patient appointments, patient evaluations, compliance paperwork

Target Audiences

1. Consumers—Millennials, but also middle age and older patients who are looking for doctors and easy way to manage their health. Insured and uninsured. Consumers who are relocating.
2. Doctors—Any doctor looking to fill empty time slots, needs tools for more efficient practice, doesn't have time to do marketing, has no social media presence, wants to spend more time with patients and less on completing forms, wants real-time data for patients to be able to quickly help. Doctors establishing practices.
3. Suppliers—any health/medical related company who offers services patients may need.

RFP Background:

- US healthcare is a \$3.2 trillion industry
- Per capita spending is \$10k/American/year
- Failure to make healthcare better, more efficient, and more cost-effective
- No easy way exists for patients and healthcare consumers to navigate physicians, professionals, and facilities

Our current objective is to:

1. Create an all-encompassing, frictionless, and transparent healthcare platform for clinicians, patients, and suppliers.
2. Enable patients to receive the most efficient care
3. Introduce and provide the latest and most advanced technologies to providers

NameWithheld is currently in Beta testing with doctors and will soon be Beta testing with consumers. Planning for soft launches after January 1 in select cities.

RFP Terms:

Evaluation Criteria

We will evaluate agencies for their ability to meet the requirements of the goals outlined in this RFP. We will also evaluate each agency's philosophy, related industry experience and overall "fit" with NameWithheld.

Required Capabilities & Strengths

The winning agency must demonstrate abilities and strengths in the following key areas:

1. Show evidence of creativity with out-of-the-box thinking that led to surprising results.
2. Proven examples of the intelligent integration of traditional media relations and digital marketing programs (may include social media integration with PR).
3. Relationships with the industry publications and digital influencers that are most important to our industry.
4. Keyword research that has helped clarify the strategic use of language that resonates with our 2 audiences. Evidence that your keyword research drove a change in language used to describe a category, product or service for other clients (and not just for SEO benefits).
5. Reputation Management & Crisis Communications experience.
6. Proven experience boosting earned media coverage using digital advertising to reach highly targeted audiences who may not have seen the earned media article in its original placement/publication.
7. Proven experience maximizing the distribution of content across various targeted channels that maximize reach and have a measurable call to action (i.e. website sign ups, reviews posted, doctors onboarded, etc.) As an example, you have taken a by-line article that was published in targeted media and adapted it to be distributed as:
 - A. An email call-to-action for the sales team
 - B. A tweet, a post or a pin linking to a landing page (for lead-gen)
 - C. A digital ad linking to a landing page (for lead-gen)
8. Show evidence of great writing for 2 intended audiences, both in terms of depth of credibility, persuasiveness and that complies with HIPAA, etc. (blogs, white papers, etc.)
9. Have experience and resources available to address other needs including:
 - A. The ability to interpret market research to influence the strategic direction of the program
 - B. Strong ties to healthcare, medical organizations for partnership opportunities
 - C. Familiarity with health and medical marketing compliance issues, rules

Optional—not required but may submit the below as part of overall integrated marketing program:

- A. Social media management
- B. Digital advertising (especially integrated with traditional PR programs)
- C. Event marketing (local, grassroots, viral)

Timeline

Wednesday, November 1	Suppliers receive and review this RFP request
Wednesday, November 8	Suppliers to complete and return the Non-disclosure form
Friday, November 24	Final RFP proposals due by close of business
Wednesday, December 6th	Suppliers notified of status. Follow-up calls scheduled with selected agencies.
Monday-Friday, Dec 18th-22nd	Virtual presentations and discussions. In person, where possible.
Wednesday, January 3, 2018	Final decision announced.

Single Point of Contact

Direct all questions about this RFP, and your response, to this single point of contact:

XX
XX
XX

Confidentiality

Suppliers are required to sign the Non-Disclosure Agreement prior to receipt of this RFP.

RFP Response Format

Proposals should follow the numbered questions in Part 3 and must be submitted in electronic format (Word document). All responses should be submitted to NAME WITHELD

PART 2: SCOPE

These components will make up the Statement-of-Work for the winning agency

1. Strategic Positioning Consulting

Agency will conduct a half-day strategic positioning session with senior leadership in order to succinctly communicate the brand's business value to its customers. This session will include:

- A. Online research to confirm the keywords that buyers use to search for the services we sell
- B. Online competitive research to better understand what buyers find when they search
- C. An audit of our brand's digital footprint across with insights to better position our company

Agency will analyze the results of this session and write a report with a recommended "positioning statement." This positioning statement, once finalized and approved, can be cascaded into all other marketing and sales materials in order to provide brand relevance and consistency. This document can also be used for briefing new employees, briefing investors and guiding the development of other strategic documents.

2. Reputation Management & Crisis Communications

Confidential

Agency will consult on specific reputation issues and offer plan and strategy. Also, will be expected to create a crisis communication plan on such issues as data breaches, security, compliance, social media, doctor reviews, doctor behavior, etc.

3. Media Relations

Develop and pitch our story to the most influential journalists and digital influencers (approved through collaboration). Agency will research and present a recommended list of journalists and digital influencers to pitch and present pitch ideas that represent a compelling, news-worthy story. Agency will guarantee [an average of three-to-four] media interview opportunities or stories that may appear in the media each month. Agency will also conduct bi-monthly calls and deliver a monthly report detailing activities and results.

4. Thought Leadership Articles and Speaking Abstracts

An agency writer will interview our senior executives in order to write a series of by-lined articles that will elevate awareness and build our brand equity in the areas of healthcare and technology. Each 1,500-word article tell a compelling story of innovation that will present our business as an industry innovator and leader. The agency will collaborate with our team to identify the right topic, and the perspectives that should be written into each piece. These articles will be used in a variety of ways to increase our digital footprint, including as a pitch story for public relations, as 'link bait' for the advertising program and as the foundation for email outreach from the sales team and blog posts. Also, develop and write speaking abstracts to submit to trade conferences for speaking opportunities.

5. Social Media Program

Agency does not have to have social media expertise, but agencies experienced with this medium may include paid and non-paid campaigns, including content writing, advertising and viral campaigns to integrate with all marketing campaigns with overall goal of building followers, influencers, driving traffic to website and signing up consumers, building reviews and onboarding doctors.

6. Launch City Rollout

Agency will recommend launch program for generating brand awareness in select cities. Campaigns may include influencer, viral, grassroots, social, event marketing or other integrated campaigns for driving traffic to website, creating trending topics, building followers and ultimately signing up users. Plan should be reproduceable in each city and target both doctors and consumers.

7. Analyst Relations

Agency will liaise with and build relationships with key analyst firms that cover our industry. This can be firms such as CB Reilly, Forrester, Gartner, 451 Research, IDC, etc. The agency will work with Analysts whether there are paid and non-paid relationships.

8. Measurement

PR programs can be measured using a variety of available metrics, including:

- A. Website visitors attracted by an earned media article
- B. UVMs (Unique Visitors Monthly) for each publication where an earned media article has appeared
- C. Impressions
- D. Site users (sign ups, reviews, etc.)
- E. Analytics from a landing page that is set-up to receive visitors from an earned media article that is boosted to targeted audiences
- F. Links from qualified websites/influencers
- G. Follows
- H. Shared stories
- I. Re-Tweets

- J. Click-to-Tweet
- K. Video Views
- L. Search Engine Rankings
- M. Sales revenue

Reports will include strategic insights that are interpreted from the data (instead of just data reporting).

Estimated Annual Budget

The estimated budget for this program, including the components above, is \$10,000 month. Nothing in this RFP shall create any obligation on the part of NameWithheld to award an agreement to any Agency or to award any agreement at all. We reserve the right to reject all proposals and/or negotiate or decline to negotiate with any Agency.

3: REQUIRED RESPONSE

A. AGENCY DETAILS

- a. Name of organization
- b. Primary Address
- c. Website address
- d. Contact name
 - i. Job title of person handling this RFP for the Agency
 - ii. Telephone number/mobile number)
 - iii. Email address
- e. Principle Office Address (If different than primary address)

B. AGENCY BACKGROUND (Please explain details of ownership of agency & affiliations)

- a. Where do you have offices that are relevant to this opportunity
- b. What are your core business PR competencies and capabilities? (Brief statement of what differentiates your organization – 500 words max)

C. AGENCY EXPERIENCE AND EXPERTISE

- a. Client Name
- b. Client Profile
- c. Years Held
- d. Please give brief details of what you do on each piece of business by discipline.
- e. (e.g. B2B, B2C, digital public relations, integrated marketing, advertising, social media marketing, direct marketing, etc.)

D. CONFLICT CLEARANCE

- a. Do you currently or have you ever provided any services to the following (competitive) companies: (list direct competitors). If so, please describe the products/services your agency promoted and when you ended your business with them.
- b. Please identify any other potential conflicts of interest between our company and any company currently being served by your agency.

E. AGENCY PROFILE

- a. Please show how the following disciplines represent a percentage of your annual income (please provide estimates only) for all the following:

Activity	% of Total
Digital PR	X
Media Relations	X
Public Affairs	X
Crisis Communications	X
Experiential	X
Trade Shows	X
Events	X
Content Creation	X
Social Media Management	X
Strategic Message Consulting	X
Lead Generation	X

- b. Please detail the current mix of business as a percentage of your annual revenue (estimates).

Activity	% of Total
Traditional PR	%
Digital PR	%
Social Media Marketing	%
Other (describe)	%

- c. Do you subcontract work to 3rd parties? If so, please give details here:

F. WINS/LOSSES

- a. Please list any account wins or losses in the last 12 months.

G. SECTOR EXPERIENCE

- a. Agency Experience - Please detail any recent (last 3 years) sector experience or Target Audience experience that is relevant to this brief e.g. client and brief description of the work undertaken for each brand. When did you work with them?

H. KEY PEOPLE EXPERIENCE

- Employee
- Brief description of the work (50 words per client)
- When & where was the work completed (year)?

I. DIGITAL PR STRATEGY

- Describe the biggest PR opportunities and challenges that you see for our business in the year ahead
- Describe the PR approach you would take to build our brand (digital, print, marketing, etc.)
- Describe how you would prioritize the PR disciplines you would employ for our company and the potential impact they could have on growing our business.

J. DIGITAL PR MEASUREMENT

- a. Provide us with examples of your monthly reports showing the strategic insights gleaned from data.
- b. How would you show the ROI for our PR program?

K. REFERENCES

- a. Please provide:
 - i. Three (3) case studies relevant to our industry;
 - ii. Three (3) client references.

L. ADDITIONAL INFORMATION

- a. Please provide any additional information to support your submission: