*How to Use This RFP Template*

*All green text (which is also italicized) is for your guidance and should be deleted as you complete your RFP. All parentheticals are meant to be replaced with your actual information.*

*This template has been developed with the assumption you are sending a RFI to “first-round” agency candidates prior to sending a RFP to a fewer number of agency finalists. However, if your preference is to skip the RFI process and only send a RFP - we recommend you determine which questions from the* [*RFI template*](https://docs.google.com/document/d/1LGovpYS6lQuSosyXhrUALnYiUfNdNYaW7ng75Zym5Vo/edit#) *should also be included (copied and pasted) in your RFP.  
  
Like the RFI, answers you provided in your* [*Self Assessment*](https://docs.google.com/document/d/1pU7s9VJjSr3U6v5PiU4lgSmOCgPCrlo-KIFKKTghgPg/edit) *should once again come in handy for completing your RFP.*

**RFP by (Your Company) to (Agency)**

(Your Company) Contact: name, email address, phone number

**RFP Dates**

*Option 1 - for responses that require no scheduled presentation:* **(date) -** RFP response documents and/or decks are **due on (date)** and should be emailed to (Contact name) at (email address).

*Option 2 - for responses that require a remote presentation via conference call that may include screensharing:* **(date range) -** You will be given 75 minutes RFP responses presented on a conference call.

**Please pick a 75-minute time block (your Time Zone) that works best for a call to review and discuss your response:**

(January 15 – 10:00 – 1:00pm)

(January 16 – 10:00 – 5:00pm)

(January 17 - 9:00 – 5:00pm)

*Option 3 - for responses that require an in-person presentation:* **(date range) -** RFP responses will be presented in person at (fill in your address or specify at their location).

**Please pick a 75-minute time block (Eastern Time Zone) that works best to review and discuss your response:**

**January 15 – 10:00 – 1:00pm**

**January 16 – 10:00 – 5:00pm**

**January 17 - 9:00 – 5:00pm**

*Note regarding options above: Whenever possible, you should plan on an in-person meeting as part of your RFP process, with a remote conference call being the next (alternative) option.   
  
We don’t recommend asking agencies to “throw something over the fence” with no opportunity to walk you through their response unless the circumstances are related to:*

* *A relatively narrow scope of work of work that’s been clearly defined and understood by all*
* *Agencies you know and have already worked with*
* *Getting some quick pricing for a budgeted project that likely has a small range of variance*

1. **Background, Purpose & Objectives**

*This should include a more detailed extension of what you provided in your* [*RFI template*](https://docs.google.com/document/d/1LGovpYS6lQuSosyXhrUALnYiUfNdNYaW7ng75Zym5Vo/edit#) *under the “Challenge & High Level Requirements” section:*

* *Start with the purpose of your request as it relates to overarching requirements and the vision you have for the kind of agency partner you’re looking to work with.*
* *Reference questions 7, 8 and 9 in your* [*Self Assessment*](https://docs.google.com/document/d/1pU7s9VJjSr3U6v5PiU4lgSmOCgPCrlo-KIFKKTghgPg/edit) *to determine details you may wish to add in sections 1 and 2 of this RFP.*
* *Reiterate overarching goals, in addition to specific objectives. Note: we like the OKR (****Objectives*** *and* ***Key Results****) approach to documenting objectives. This includes “inspirational” objectives (i.e. “Crush our conversion metrics”) paired with quantitative results (i.e. “15% or more conversion rate, with over 4,000 conversions”).*

*Example:* Spurious is seeking a relationship-oriented, modern agency partner with cutting edge experience that can be leveraged to increase our U.S. footprint, brand awareness and sales initiatives.  
  
Our goal is to engage with an agency who not only has great ideas, but can execute on quarterly campaign initiatives to drive no less than 1,000 new unit sales within the next 12 months. We desire to partner with a collaborative group of experts who can work closely with our 8-person marketing team, effectively leading as well as serving with multiple creative and brand managers.

The selected partner should have a firm grasp on our current strategy, and ideas of where to grow that strategy. We are separately providing additional research and data for your consideration.   
  
*Note: If not included herein consider sharing separately attached insights from competitive or industry research/analysis, past performance data, target audience information, etc.*

Objective and key results include:

* **Crushing our conversion metrics**: 15% or greater conversion rate with over 4,000 Conversions
* **A wildly successful Q3 campaign**: 1,000 new subscribers, and 5% brand lift
* **Massive sales growth**: 40%, with over 20% of that from new product line

1. **Scope & Services**

*This section should provide a combination of the capabilities you are seeking with the scope of work (to whatever extent you’ve defined or have chosen to identify).*

*Example:* We are looking to an agency partner who can demonstrate strengths within the following areas/capabilities:

* Online advertising (search, ppc, display, social, programmatic)
* Content marketing (copy, creative, video)
* Social media / Influencer marketing
* SEO
* Email marketing
* E-commerce and conversion optimization
* Strategy, analysis and unified reporting

Although we may collaborate with you to further refine our scope of work, the following is a fair representation of our requirements.

1. Content & Creative

* 4 content pieces per month for “always-on strategy” initiatives (may include blog posts, pillar articles, video, etc)
* Quarterly campaign strategy and supporting content (campaign ideation/concepts, messaging, and creative)

1. Digital Advertising

* Media planning and ad management
* A/B testing with copy and creative
* Reporting on ad results

1. SEO and Email Management

* Management of product feeds, organic search engine visibility, loyalty program and ecommerce CRM efforts.

1. Reporting

* Monthly reports detailing KPI results, strategy suggestions, top performing efforts, ROAS, etc.

**3) Budget**

*You should assume every agency will want what an accurate budget or budget range to consider as part of their response. This isn’t just to make their jobs easier, but to make their responses more comparable and realistic.*

*If you choose to ask for campaign ideas or related recommendations (more on that in item 5 below), an agency will often rely on your stated budget as the ultimate parameter for proposing something that will fit in scope.   
  
Finally, it is also helpful to specify what amount (if known) is intended for the media budget (ad spend). If that is unknown, at least specify if the stated budget is inclusive of a media / ad spend.*

*Example:*

Anticipated budget: $1M for scope and timing as outlined, with no less than $800k allocated as media / ad spend. Additional budget may be available for new opportunities identified during the course of the year.

**4) Timeline**

*This section should give the prospective agency a timeline of action items for the RFP process from invitation to final selection date.*

*Example:*

|  |  |  |
| --- | --- | --- |
| **Day** | **Date** | **Description** |
| Friday | 8/3 | RFP Sent to Finalists |
| Friday | 8/10 | Email Questions About RFP |
| Monday - Friday (2 weeks) | 9/10 - 9/21 | Scheduled Presentations |
| Friday | 9/28 | Winner Notified |

**5) Proposal Submission and Deliverables**

*In summary, this section should give agency candidates clear direction about how and what they should prepare for submitting their response. You’ll want to determine how specific or open-ended you are with instructions and formats. Example: specifying number of words, slides within a deck, number of minutes to present, etc.*

*Try to make your submission requirements for what you’re asking them to deliver very purposeful, considering what else you can learn about the agency candidates, and how their responses might help you meaningfully differentiate them from others.*

*It’s great to get a sense of an agency’s attention to detail, as well as an understanding of their ability to follow directions (or deviate for good reason) -- but as much as possible, avoid testing these attributes with administrative particulars that can detract from the time they should spend showing you the most important elements of who they are.*

*Finally, make a careful consideration between questions and requirements that help you understand an agency’s creative and/or strategic approach vs. asking agencies to submit big campaign ideas (more on that under* ***Big Free Ideas vs. Big Creative Approaches*** *in the* [*How to Hire the Right Marketing Agency Buyer’s Guide*](https://docs.google.com/document/d/1qXIXVQPrXbTa56bgS4p2PEsOSqs2OgyKIzkMyF6dYAw/edit)*).*

*Example:* Please send a completed deck and any other information deemed necessary to [email@email.com](mailto:email@email.com).  
  
Please provide three references, including contact name, email and phone number.

**6) Terms & conditions**

*This section should lay out the terms and conditions of the selection process.*

*Example:* (Your company) reserves the right to pick whichever agency as the selected partner regardless of bid pricing, or any other reason. All submitted ideas and information in proposal can be used regardless if agency is selected or not.

Late submissions will not be considered. A signed NDA must be received in order to participate in this RFP.

**7) Contact**

*This section should give the prospective agency a contact for this RFP.*

*Example:*

For more information please reach out to:

(Your name)

(Job title, Company name)

(Company mailing address)

(Email)

(Phone number)