

**Marketing Agency Request for Proposal [TEMPLATE]**

**Purpose of an RFP:**

A Request for Proposal (RFP) is an important step to help you level the playing field when researching marketing agencies. At its very core, an RFP is a formal invitation you give to the marketing agencies on your short list. This invite serves three main objectives. First, when an agency responds to an RFP, they are saying “yes” we are interested in your business. Second, you are gathering a base-line of information that helps you compare and contrast the agencies that have responded. Third, you are sharing your requirements so that the agencies understand the scope of your program or project.

**Instructions:**

1. Complete each section in this document.

**Pro-Tip:** As you fill in the blanks, you’ll realize that you may not have a simple answer for each section. That is ok, because a well-crafted RFP makes you really sit down and think about what you’re looking for. It is also a forcing function to help you figure out what you really need the scope of the program or project to be. This isn’t a place to skimp. Put the time and effort into creating thoughtful answers (no matter how difficult). The more detail you have hear, the easier it will be for all parties involved throughout the rest of the process.

1. Delete this page and all the “instruction comments” in the template before sending.
2. Once the RFP is complete, send the document to the agencies on your short list.

Pro-Tip: If your company requires it, include a Master Service Agreement (MSA) at the same time you send the RFP. This will cut down on the back and forth.

**Extra:**

One you have responses from the agencies on your short list, it can be difficult to review all the information side-by-side. Try using this [Agency Comparison Template](https://www.agencyloft.com/2018/12/28/digital-agency-selection-criteria-template/) to track answers and compare/contrast each agency all in one document.

[Insert Your Company Name or Logo Here]

Marketing Agency

Request for Proposal

[Insert Date]

**Primary Contacts**

|  |  |  |  |
| --- | --- | --- | --- |
| Contact | Title | Phone | Email |
| [name] | [title] | [phone] | [email address] |
| [name] | [title] | [phone] | [email address] |

**Table of Contents**

**Section 1: About [Insert Company Name]**

* Company Background
* Ideal Customer
* Technology Stack
* Competitors

**Section 2: Program or Project Objectives**

* Objective Summary
* Scope of Work
* Schedule

**Section 3: Criteria for Response**

* Evaluation Criteria
* Presentation / Proposal Requirements

**Section 4: Terms and Conditions**

**Section 1: About [Insert Company name]**

**Company Background**

* Description of your organization
* What products do you sell?

**Ideal Customer:**

* Who do you sell to (persona)?
* Which verticals do you target?
* Size companies you sell to (Small, Mid-Sized, Enterprise)

**Current Marketing Technology Stack:**

Add the relevant marketing technology tools that the agency will need to know about.

* Website CMS platform: [insert name]
* Marketing Automation platform: [insert name]
* CRM platform: [insert name]
* [Any additional relevant Martech – add here]

**List of Competitors:**

Primary competitors stack ranked 1-3.

|  |  |
| --- | --- |
| [competitor name] | [competitor web address] |
| [competitor name] | [competitor web address] |
| [competitor name] | [competitor web address] |

**Section 2: Program or Project Objectives**

**Project or Program Objectives:**

Below, find a summary of the objectives for the request for proposal.

* Current Challenge

[Insert up to 2 paragraphs]

* Agency Services to Support Objective

[Insert up to 2 paragraphs]

**Scope of Work:**

Additional Detail about the program or project.

|  |  |
| --- | --- |
| **Requirement** | **Detail** |
| **Web Development** | Create a new modern website |
| **Responsive Design** | Website should be responsive, allowing for mobile viewing. |
| **Custom Development** | Need a knowledge center to be custom built |
| **Copy Writing** | 15 pages written and created from scratch |
| **Video Production** | 3 Videos created (animation) |
| **Content Creation** | 2 white papers (5 pages each) |
| **Blog Creation** | 2 blogs per month for six months |
| **(add to this list)** |  |

**Additional Details:**

[Add any additional details that the agency needs to know in this section. Use as much space as you need]

**Relative Examples:**

Creative examples that that illustrate possible outputs of the project.

* [Example 1 Name / Hyperlink]
* [Example 2 Name / Hyperlink]
* [Example 3 Name / Hyperlink]

**Program or Project Schedule:**

Below is the schedule of our current time-lines. It is subject to change.

|  |  |
| --- | --- |
| **Project Milestones** | **Deadline** |
| RFP Delivered to Agency | [Month / Day] |
| RFP Questions Period Ends | [Month / Day] |
| RFP Close Date (RFP must be returned no later than this date) | [Month / Day] |
| Proposal Review (virtual or in person) | [Month / Day] |
| Agency Evaluation | [Month / Day] |
| Award Project to Agency | [Month / Day] |

**Section 3: Criteria for Response**

**Evaluation Criteria:**

All proposals will be evaluated against the following criteria. In your response, please be specific about how you meet or do not meet the line item below.

* [Insert specific item that you will be looking for]
* [Insert specific item that you will be looking for]
* [Insert specific item that you will be looking for]

**Presentation Proposal Requirements:**

With the goal of helping you focus your presentation, we ask that you include the following items in the proposal:

**Agency Information:**

Help us get to know you better.

* **Corporate Overview:** Including the number of full-time employees, number of contract employees, office location(s), and date founded.
  + Primary markets served
  + Number of customers served
  + Marketing services you offer as an agency
  + Marketing services that you currently sub-contract
  + Awards won over the past 3 year

**Proposed Solution:**

* Detailed explanation of the proposed solution
* Make sure to cover all items in the scope of work
* Identify areas of unique expertise
* Share 3 creative examples from prior work to help explain

**References**

* Minimum of 3 reference customers

**Estimated Budget & Project Plan**

* Provide a line-item breakdown of costs associated with the full program. Costs should include fixed pricing, variable pricing ranges, any billable hours, travel expenses, etc.
* All proposals must include a project workback schedule that includes:
  + Timelines
  + Key Milestones
  + Delivery Dates

**Section 4: Terms and Conditions**

This is an invitation for proposal only.

[Insert Your Company Name] shall not be obligated in any major to any vendor until a written agreement has been executed.

[Insert Your Company Name] shall not be liable for any costs associated with the preparation of presentation or proposal materials.

While sub-contracting any phase of the work may be considered, the vendor submitting the proposal must assume full responsibility of the end-to-end process. Vendor must disclose if they are using sub-contracted services as part of the proposal.

Any and all verbal discussions and responses are not binding on either party.

[Insert Your Company Name] may issue addenda during the proposal period by the designated official. All addenda become part of the RFP documents and responses must be submitted with the proposal. It is the responsibility of the vendor to establish whether or not [Insert Your Company Name] has issued any addenda.