Sample Request for Proposals

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Website RFP Template

Provided by Yoko Co, a web agency for organizations
driven by a purpose beyond profit.

[www.yokoco.com](http://www.yokoco.com)

Open for use by any organization looking for a quicker, better way to begin the search for a new website partner.

# Explanation of this document

Yoko Co has provided this website RFP template to help you attract the best possible partner for the development of your website.

Here are a few quick resources to learn more about RFPs:

[Most Important Thing to Know Before Writing a Website RFP](http://www.yokoco.com/?p=2687).
[Top 12 Questions to Ask in a Website RFP](http://www.yokoco.com/?p=2695)
[3 More of the Best Questions to Ask in a Website RFP](http://www.yokoco.com/?p=2699).

When you use this template, be sure to change the format and design of the document to match your organization’s look. There are many areas you’ll need to change and customize to your situation.

* Text in green can, and should, be removed entirely.
* Blue text is mostly structural, but you’ll want to change it as needed.
* Black text is simply there to act as a placeholder and give you some idea of the type of content that should go there. You’ll want to replace most, if not all of that.

When you’re done, do a search and replace for “Agency” just to make sure you didn’t miss any.

Once you’re completed your RFP, feel free to send it to questions@yokoco.com with the email subject “RFP Review Please” and we’ll provide a complementary review of the RFP before you release it. Or instead, if you would like us to send us your RFP so we can bid on your project, you can send it to questions@yokoco.com with the email subject “RFP for Consideration” and we’ll get back to you. We hope this template is helpful and that you’re on the right track to building a successful website!

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# Summary

We’ve positioned this sample text from that of a marketing agency (Agency) looking for a new website vendor. It’s for reference only. You should replace the black text or at least modify it to match your organization’s needs.

Agency is requesting proposals from qualified candidates for the redesign and development of our website. The criteria and guidelines for proposal submission are specified in this Request for Proposal (RFP). Proposals should address each of the concerns addressed in this document, and should be submitted via email to agency@agency.com by midnight on XX/XX/XXXX, the due date.

# Organization Overview

Agency is an interactive marketing firm, founded in 2009, that specializes in helping organizations with complex offerings, compliance restrictions, and other stringent rules and regulations create engaging and compelling content that in way achieves tangible business results.

We add a layer of accountability to organizations which shifts marketing from a procedural role focused simply on execution to a strategic role focused on value.

In long term engagements we provide ongoing strategic consulting and tactical support to continuously improve the value marketing brings to the organization as a whole. Bottom line we help clients’ websites generate results and revenue they can see.

The company has annual revenue of just over $5 million per year, a full-time staff of 22 employees and an extended network of consultants.

Agency follows a mission to make the world a better place than we found it by enabling, educating and empowering entrepreneurs. We do this in three ways:

1. Through the philanthropies we are involved with which educate young adults and students on the benefits and global contributions entrepreneurs make.
2. Through our clients by educating them on how to better use their marketing and website to achieve business results.
3. Through our own employees by educating them on how a business is run, and allowing them to lead industry focused spin off projects.

It is our belief that by enabling those we touch to become entrepreneurs that they will be able to continue to tackle the problems we face as people, and with the proper education they will be better prepared to solve these problems successfully and ultimately leave the world a better place.

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# Website Background

Our current website was built in 2010 and is riddled with issues which are outlined below. The website is approximately 150 pages, 100 of which are blog posts and articles which we would like to have migrated over as-is. The other 50 core pages of the website are usable, but will need to be edited or overhauled before use on our new website.

## Website Issues

* Agency’s brand has evolved over the last year, and includes a new style including the logo, colors, typeface selection among other things. The website needs to match.
* The current website is difficult to update as it must be edited in a code editor and then uploaded to a directory via FTP. We would like to make it easier to update.
* There is no search function, which has been the brunt of many complaints via email.
* The website does not work well on mobile devices, and is essentially unusable on smart phones.
* The website is very restrictive and what can be updated, and how it must be updated to avoid breaking the site.

# Audience Personas / Avatars

## Our primary audiences for our new website include:

* CEOs
* CIOs
* VPs of Marketing
* Directors of Communication

You can add as little or as much as you’d like to describe your audiences.

# Purpose and Objectives

## Purpose

Agency’s website serves as the first impression most people will ever have with our organization, including new potential clients. We want the site to create a first impression that is consistent with our brand message and styling. Some common adjectives that are used to describe us are BOLD, MINIMILASTIC, EASY TO USE, NIMBLE and KNOWLEDGABLE.

Beyond the first impression, our website needs to quickly and easily connect our audiences with the content that is important to them. We hope to accomplish that in collaboration with the selected firm.

## Objective

While our purpose is to educate and disseminate our content, the website’s primary objective from a business standpoint is to generate business results. For Agency that objective is fairly straightforward. We want to open new relationships with those target audiences who are members of our ideal client personas. The primary measured objective will be the number of new leads, or ultimately clients, who have discovered us through the website.

While we do have a fairly long sales cycle, it usually last about 2 months from first contact to the point where we begin work on the client’s project. Because of this, we have some other marketing related goals, or key performance indicators (KPIs), that are also applicable to the website. They are listed from most to least important.

(Note: If you are currently tracking these KPIs, provide the current and desired outcome. If not, listing them is ok, but additional discussion will usually be needed to determine the metrics for success.)

### Website Key Performance Indicators

1. Sales inquiries
	1. Through the site via a contact form
	2. Through the site via a phone call
	3. Through the site via a direct email
2. Content driven contact requests through the website
	1. Request for case study, white paper, checklist, etc. (If you’re reading this RFP template this might look familiar.)
3. Email subscription signups
4. Podcast subscription signups
5. Social media shares or mentions
6. Number of pages viewed (per session)
7. Rank for select key words/phrases
8. Total non-bounced traffic

# Scope of Work

Agency expects the selected candidate to execute in the following capacity. If additional information is needed, let us know via email and we’ll aim to provide it if possible.

## Discovery

We expect the candidate to take the time to research and learn about our organization. Through that education, the vendor should confirm the objectives, work to be done, timeline and budget. We also expect the selected candidate to inform us if, due to new information, they believe the solution presented in response to the RFP needs to be altered.

(Note: If you’re using this template you’re likely not too certain about the technical details of what you want or need, and will want to leave the discovery process up to the selected firm.)

## Architecture

While we know our end objectives, we are not sure how best to achieve them. To that end we will entrust the structure and architecture of our website to the selected candidate. We expect you to take a leadership role in determining how the site should be structured in terms of information and accessibility.

(Note: Depending on how hands on you plan to be, you may already have a site map or site structure in place. If you do, share it here, or at least let readers know you have the content and it is available for request.)

## Content

Agency, as previously mentioned, will provide 100 pages of content to be used as-is for the redesigned website. These pages are mostly blog articles. We are able to provide another 50 pages of content, but will need an editor to help edit these pages if they are to be used. We also expect that we may need some new content written. While we can provide input and expertise, we would like the selected candidate to provide copywriting.

Regarding multimedia content, Agency has an archive of some video content but we have not used any of it to this point. We do believe video would be an effective tool used correctly in our new site, but will need some help determining what kind of video would be best, and may need help shooting and editing it.

Beyond that, Agency has recently had a photographer take shots of all of our employees and offices, as well as other miscellaneous imagery we thought would be useful.

(Note: This is an area you should think about thoroughly before releasing an RFP. If you have experience writing content for the web, you may want to do this in house. If you don’t have experience, you’ll most likely want to ask the selected firm to do it, or to collaborate with you. This gives you a chance to learn, so you may be able to do this internally next time.)

## Design

Agency expects the selected candidate to lead the design process. This includes translating the information and objectives we share into cohesive designs and presenting those designs.

As for visual input we do have a basic brand book with style rules and typefaces we can provide.

(Note: This is usually left to the designers, though any good designer will ask you for samples of design you like and what you like about it. You may want to provide those influences here, or inform the reader that they are available upon request.)

## Development

We trust the selected candidate will have the skills and expertise to develop the approved designs. We ask that you follow best practices, and ensure that the site is built in a way that is easy to update, quick to load, and works well on mobile devices. We would like to use a content management system, but do not know which one. We would ask that you recommend one.

(Note: Again, if you’re using this template, you’re most likely not executing a technical RFP and should therefore only list specifications you are 100% certain about. For example, if many of your employees know how to use WordPress, it may make sense to ask that your next site is also built in WordPress. Beyond that, don’t make assumptions about what you need, at this stage of the process that can drastically change the outcome.)

## Migration

While we expect to play a role in providing the content to the selected candidate, we ask that you migrate the content that is to be used as-is from the old site to the new.

(Note: If you want a turn-key site, this makes sense to leave in the hands of the selected vendor. If you want to collaborate, or be hands on in the process, you may offer to do this, or ask the reader to share options.)

## Project Management

We ask that the selected candidate take lead on project management, and will assign a point of contact within our organization to act as a liaison. Part of the project management is expected to include a project plan, with timeline and milestones as well as review periods. If needed, we look to the candidate to select a project management system and requisite access.

(Notes: If you have never managed a website redesign before, let the firm take point on project management. They do this all the time, and it can be an educational process for you. Conversely, if you do have experience successfully redesigning a website, you may want to manage the project internally – however that is usually a structure that is presented in more technical RFPs.)

## Quality Assurance

The selected candidate will be responsible for all cross-browser compatibility testing including on tablets and mobile devices.

(Note: Any good firm will include this as a default, but when you mention it, it lets them know you know. If you’re aware of the various browsers and versions your visitors most often use, you may want to mention that here. It should also come up during the discovery process.)

## Training

Once the site is completed, or near complete, the selected candidate is expected to provide training to the Agency staff in the proper use of the platform and tools which power the site.

## Maintenance

Once completed, the site is expected to run error free, with the selected candidate providing a period of support and maintenance included in the contract.

(Note: Be sure to have a beta period where technical errors will be corrected at no charge. No matter how rigorous the testing, no website will work correctly under all possible permutations of device, operating system, browser, plugins, other tabs and services, etc.)

Additional Notes: This section of the RFP essentially creates the parameters of the bids you’ll receive. If you want to have the selected firm include other services, be sure to mention them here. It may be media creation; like a video or animation, or simply copywriting. It could be consulting on how to create your own content, or how to create the processes to communicate the site’s results and impact on the organization. Share those needs to they can at least be addressed.

# Budget

The candidate should provide detailed pricing which includes all elements of the project listed in the scope, as well as any other effort or services they believe are required for us to reach our desired objective.

(Note: It may also be useful to ask for the pricing of optional services or suggested tools and platforms in the budget. You may also want to ask about payment terms and schedule in this section.)

# Timeline

Agency would like to launch the new website by XX/XX/XXXX in time for a new major initiative we are undergoing. This timeline is expected to be taken into consideration in your project plan.

# Contact

## Contact

Responses to this RFP should be sent to John McFakename at agency@agency.com. Responses should be submitted by midnight on XX/XX/XXXX. Proposals which are submitted late will not be considered. Proposals may not be revised after submission.

The price quote should be all inclusive. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees. Any costs incurred in preparation or submission of proposals or during the interview process are the candidate firm’s sole responsibilities. Agency will not reimburse for any costs incurred as a result of the preparation or submission of any response to this RFP, or for any costs related to the decision process. Agency reserves the right to conduct negotiations with one or more respondents if, in our opinion that method will provide the greatest benefit to Agency.

(Notes: If you are an organization that requires legalese, this is where your legal advisor will make you put it. That said, usually the only info you need is to make sure the candidates know they are not compensated for their response, and that you have the right to use the information submitted whether they are selected or not.)

## Proposal Format

Please provide responses as a PDF using no fonts smaller than 10-point size. Ideally proposals will not exceed 50 pages. Please include your company name, point of contact, and contact information on page 2 of the proposal.

(Note: You don’t really need to provide much here, but if you want to make sure you receive everything in a comparable format, you may want to set some basic guidelines.)

## Selection Criteria

Agency will grade the proposals based on the following criteria.

1. Value of recommended solution.
2. Volume of applicable experience and prior results.
3. Alignment with goal and purpose.
4. Aesthetic style and portfolio.
5. Strength of references and past work product.
6. Pricing and payment terms/schedule.
7. Presentation format and attention to detail.

(Note: If you’re making a decision by committee, then it makes sense to apply weights to your selection criteria, and then factor in everyone’s ranking of each proposal on each selection criteria. Please note, selection by committee often turns out mediocre. If not necessary, you’ll often be better served having one or two people at most being responsible for the website, and empowered to go in a bold direction and take the risks required to make something great.

# Final Notes

If you have feedback, good or bad, or recommended changes to make to this template, please share them! Email us at questions@yokoco.com. This template is meant to be just that, a structural template with some fictional sample content to help get you started. Unfortunately, the needs of any website worth building are too unique to make it as simple as performing a search and replace.

Remember that everything is flexible! Feel free to add sections you think you need, or remove sections you think are superfluous to your organization or your objectives. Add more details in places where you think they are warranted, and be brief where it is acceptable. Make as much information about yourself available – that doesn’t mean you have to share it here, but let candidates know it is available if they want it.

It is our hope that this template helps you get the most value out of your website regardless of whom you work with on it.

If you have decided an RFP is the right route for you to take, but would like someone to review it and make suggestions before you release it send it to questions@yokoco.com with the email subject “RFP Review Please” and we’ll provide a complementary review of the RFP before you release it.

If you don’t want a review of your RFP, but would like us to consider responding to your RFP please send it to questions@yokoco.com with the email subject “RFP for Consideration” and we’ll get back to you. All the best!