

Digital Marketing Request for Proposal Template

Prepared by

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Company Background

Start by giving an introduction to your company. The vendors you're reaching out to probably know little to nothing about you. Share details such as who your company is, what the company strives to be, and what makes it unique. Provide those company missions and values.

Current Digital Ecosystem

Give an honest overview of your current digital ecosystem including content, function, and integrations. Be as specific as possible. You may want to include answers to the questions below. Providing the answers to these questions will give vendors a look under the hood and help them understand what they are in for.

1. What is the current state of your digital ecosystem?
2. Are you pursuing content marketing programs, social media marketing, online advertising, PR, etc.?
3. What triggered you to write an RFP?
4. What is the purpose of your digital initiative?
5. Can you share any persona data?
6. What content management system (CMS) are you currently on?
7. Are you currently using a customer relationship management (CRM)?
8. Are you currently using a marketing automation system?
9. On what platform is your site currently hosted?
10. How many site visits do you get per month?
11. How many leads do you get per month?
12. How many customers do you get per month?
13. How are you currently driving traffic to your site?
14. Are you using partner agencies for social, content, branding, SEO, etc.?

Marketing Challenges

List your pain points and try to articulate the challenges of your digital ecosystem the best that you can. The more the prospective agency knows about your situation, the better they can deliver a customized solution for you.

Common marketing challenges include:

1. Not attracting new leads
2. Not converting leads into opportunities
3. Lack of awareness in the marketplace
4. No defined process for creating and scaling content development
5. Outdated messaging that doesn't resonate with audience
6. Low retention rates
7. Inconsistent branding

Business Goals

Your business goals should reflect what you want your digital marketing strategy to achieve. What are the handful of things that, if done well, will be a success for your company?

Examples of achievable business goals:

1. Increase revenue for the next fiscal year
2. Gain larger market share in the region
3. Improve up-sell/cross-sell activity
4. Increase operational efficiencies
5. Reduce call volume
6. Improve customer satisfaction

Project Objectives

Your project objectives are tactical plans that, once implemented, will help achieve your business goals. Now that we know your business goals, articulate how you want to get there.

Project objectives may include:

1. Email marketing strategy
2. Lead generation campaign
3. Social media strategy
4. Search engine marketing
5. Forward-thinking website

Target Audience

Include who your target audience is so your vendor knows who your website is supposed to serve. It would be helpful to call out the desired actions of your target audience (e.g., internal users would like to update and modify content on the site).

Scope of Work

This is where you'll want to provide more detail about your project. You can go as far as listing all the services you are seeking so only agencies that are a good fit respond. Keep in mind that you can break your deliverables into phases for budgeting, timing, or resources.

In the scope of work you should include:

1. Desired functionality (ecommerce, personalization, filtered search, etc.)
2. CMS preference (Open Source, .NET)
3. Software training
4. Integration with 3rd parties
5. Content audit/gap analysis
6. Content strategy
7. Copywriting needs
8. Content migration needs

9. Content distribution plan
10. Social media management
11. Search engine optimization
12. Paid search/advertising
13. Media planning
14. Reporting analysis
15. App development
16. Marketing automation

Giving a specific list of deliverables will give the agency a better idea of what to budget and plan for, giving you a more accurate estimate in return.

Competitors

Give the names and URLs of at least three competitors so your agency can provide a competitive analysis that reveals what you are doing well and where you fall short.

Looking at businesses across different industries can also provide innovation and inspiration. It might be difficult to explain your vision, so providing examples of companies you admire will help clarify what you hope to accomplish. Send any websites, emails, social media, advertising, etc. of businesses you like and state why.

Timeline/Budget

Share any parameters that exist regarding the available budget and timeline for your initiative. If you do have a specific timeline, is there anything driving your go-live date?

By stating explicitly what you want to pay, you weed out the vendors who don't fit within your budget range and vendors who won't be able to finish the project in time.

Selection Timeline

List important dates that are driving your selection process. This will help you stick to a strict timeline and will keep your vendors aware of next steps.

Dates to include:

1. Notification of intention to bid
2. Q&A period
3. Proposals due
4. Notification to finalists
5. Finalist presentations
6. Vendor selection
7. Project start Date

Response Requirement

Let vendors know what information you are expecting to receive. The clearer you can set expectations from the outset, the less chance you have of being let down.

Criteria for Response:

1. Background of company
2. Project approach and timing
3. Relevant experience & qualifications
4. CMS platform recommendation
5. Marketing automation recommendations
6. Ad server recommendations
7. Project management
8. Pricing

Lastly, provide the number of copies you would like to receive and to whom they should be addressed.

Main Point of Contact Information:

1. Full name
2. Job title
3. Address
4. Phone number
5. Email