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# Marketing Services: Request for Proposal

INSERT DATE

## Organization Information

**Organization Name:**

**Address:** Your address. Your agency partner will typically care most about your HQ.

**Phone Number:** Your phone number

**Website:**

**Primary Point of Contact:** Who’s going to be running the project? Your agency partner needs their name and contact information, at minimum. A LinkedIn URL is helpful, too.

**Organization Overview:** How did your organization come to be? What do you do? Who do you serve?

**Mission & Values:** Why do you exist?

**Key Differentiators:** What makes you special?

## Project Information

**Project Overview:** What do you need done?

**Project Purpose:** Why are you making the ask? What problem are you trying to solve? This helps your agency partner prepare their response.

**Goals & Expected Outcomes:** What do you want to accomplish? What specific metrics will you use to evaluate success? What does “great” look like?

**Budget:** Even if you don’t have a specific number yet, be clear about how budget will be allocated. A budget range is fine, but the more exact you are, the better the pitches you receive will be.

## Timeline

**Deadline to Register Interest:** When does the agency need to say they’re interested in being in the running? How should they get back to you?

**Deadline for RFP Questions:** What’s the latest an agency can ask you clarifying questions? How will you get back to them?

**RFP Submission Deadline:** When do you want to hear back?

**Final Interviews:** When will you narrow the field and hold final interviews or pitches?

**Agency Selection:** When will you make your final selection?

**Project Start Date:** When do you want to kick off? Is this flexible?

**Project Completion Date:** When do you want to finish? Is this flexible?

## Team Information

**Team Bios:** Provide short bios of each team member involved in the project, including LinkedIn URLs. This will help the agency provide relevant information.

**Communication Rules:** How should the agency communicate with you during the RFP process? Be specific about who should get what, when.

## Selection Criteria

**Ideal Partner:** Describe your ideal agency partner. Are they large? Small? Tech-first? Purely creative? This will help limit the amount of “junk” submissions you receive, since agencies who aren’t a fit will naturally gravitate away.

**Who’s in the Running?** It’s extremely useful to agencies to know the basics of your process. Did you submit the RFP to two agencies? Ten? Fifty? Again, this will help eliminate non-useful submissions and make your selection process easier.

**Disqualifications:** What would disqualify an agency from winning the project? Do they absolutely need industry experience? Must they be B2B-focused? If there’s anything you simply won’t or can’t consider, list it here.

## Submission

**Requirements:** What specifically should respondents send you? Typical “asks” include a scope of work, line-item budget, team member bios, relevant work examples and references.

**Instructions:** Are there any special instructions for how you want work submitted? For example, do you want everything uploaded to a Dropbox URL? The more specific you are, the easier the process will be for you.