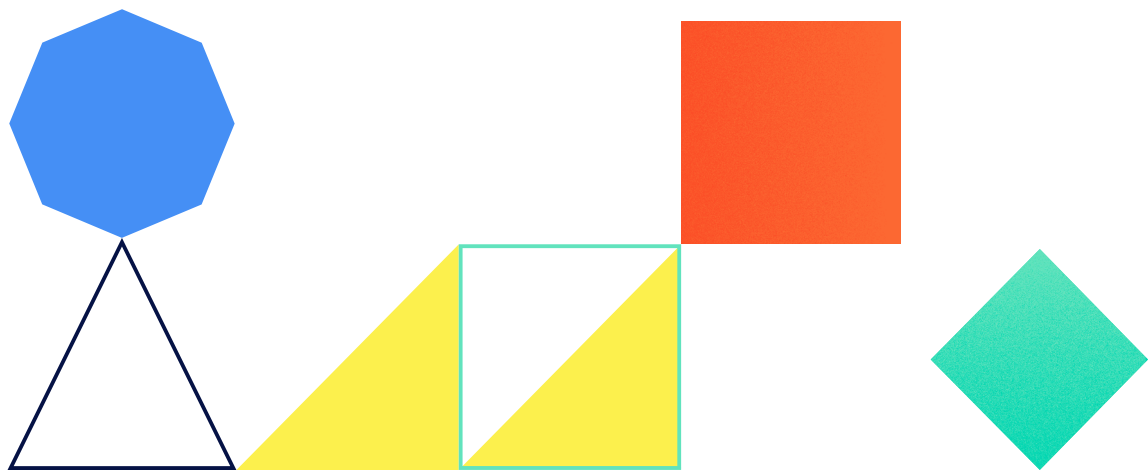


**Twirling Umbrellas.**

REQUEST FOR PROPOSALS GUIDE

# How to write an airtight website RFP

Tips, must-haves & watch-outs to  
get quality proposals from qualified  
digital agencies.



So you got dealt the responsibility of writing an RFP for your company's new website. It might seem like a daunting task. After all, your team is counting on you to shape the company's digital future.

You know how important your online presence is to your organization. You're taking steps to plan for it and make sure it serves your company's needs, now and for years to come.

Unless you have expertise in web development, there will be a lot of unknowns to consider, and it's best to start with some research. So, congratulations. Because the fact that you're reading this means you're on the right track.

## What's in this guide

- ▶ The digital agency POV
- ▶ Goals every RFP should have
- ▶ 9 must-haves for RFPs
- ▶ Common pitfalls to avoid
- ▶ Why a website RFP is different
- ▶ Insights to find qualified agencies
- ▶ Evaluating your responses

## Bonus

- ▶ Website RFP template

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### Note:

This guide focuses on RFPs for websites because that's our area of expertise. But the tips apply to any type of branding or marketing project as well.

# Answering the big RFP questions

This guide will help you get answers to some of the most common RFP questions like:



- ▶ What information is most important to include in your RFP?
- ▶ What will turn agencies off from wanting to respond?
- ▶ What platform should you be considering?
- ▶ How much should you budget?
- ▶ How will you find agencies? How will they find you?
- ▶ What makes a good digital partner?
- ▶ How will you compare multiple quotes and proposals?
- ▶ How do you gauge an agency's technical skill, when you might not fully understand the technology?

# An honest agency POV

RFPs are a contentious subject for many agencies. Some love them. Some hate them. Some are consistently successful at winning them. Others, not so much. Agencies often gripe about the cost of responding, the process for selection, or inadequate information.

Agencies put significant time and resources into responding to RFPs. Clients should return the favour by taking the time to create a clear, thoughtful, and fair RFP process.



***“The average RFP win rate for agencies is 44%.”***

- Loopio, 2022 RFP Response Trends & Benchmarks

Consultants will tell agencies to stop responding to RFPs, to nurture inbound leads and grow their own portfolio of work. This is easy advice, but it's not always practical.

RFPs have allowed us to find clients we would have never reached otherwise and take on exciting projects from around the world. We're a small agency in western Canada, yet we had the opportunity to work with an innovative social enterprise from Atlanta that uses blockchain technology to solve food insecurity. How cool is that?

It's tricky for agencies like ours to give advice about these types of things without promoting our own self interest. Of course, we want to see more RFPs matching our skillset, with bigger budgets, and more creative freedom. We're aware that when we publish content like this it serves that purpose.

So, in full transparency, this guide aims to encourage you to approach RFPs our way. As you read this guide, if you disagree with what we're saying, then we're probably not a good fit anyhow. That's ok, businesses differ in their philosophy, strategy and approach.

# Goals every RFP should have

Let's start the same way we do with all projects: identifying the objectives. The goals for creating a rock-solid web RFP should include the following:



## **Communicate clearly**

By explicitly communicating the challenge your business is facing, agencies will know the problem they're being asked to solve. Start by thinking hard about your organization's needs. What are you aiming to accomplish by getting a new website?



## **Set expectations**

When it comes to projects, clients and agencies are well-versed in the world of managing expectations. By establishing the goal posts for what you expect for your web project, when it's needed and at what cost, you're helping agencies decide whether it's a good fit for their expertise.



## **Determine outcomes**

It's ok to tell agencies what you're looking for (and not looking for) in a digital partner. It's also important to let agencies know how you'll be evaluating their proposals. This lets agencies prioritize information and their resources. It levels the playing field and helps you select the best partner for your needs.



## **Get technical**

Provide details about the CMS, functionality, features and integrations you need. Not sure what technical functionality or integrations you'll need? That's ok, you can be honest about it and ask agencies for their recommendations. Alternatively, you could work with a technical consultant to help write your RFP.



## **Be specific & realistic**

Be clear on what you're looking for and make sure your management team is aligned on the project goals. Then be sure to give agencies enough time to respond and engage in follow up communications. A rushed process will result in lower quality, less-tailored proposals.

# **9 must-haves for a stellar RFP**

**1**

## **Company Overview**

Assume agencies have never heard of your company. Tell us who you are, what you do, where you've been and where you're going. Tell us how you prefer to work and/or communicate (time zone, video call, email, slack etc). Indicate the designated Project Lead and the resources/team members your organization is going to commit to the project.

**2**

## **Audience Breakdown**

Describe your various users and stakeholders. Clearly identify why they're coming to your website and how they're getting there. If you have any analytics to support the audience information, share that as well. This can be high-level for now, a good agency will dig deeper into this in the discovery process.

**3**

## **Current Website Deficiencies**

If you currently have a website, tell us why you need a new one. What are the pain points? What needs to be improved, updated, removed, re-prioritized. Are there performance deficiencies such as speed or mobile-friendliness? Again, analytics can help here if you're looking to improve certain metrics such as bounce rate or page views.

**4**

## **New Website Needs**

Highlight your business and technical goals, and how the new website addresses these goals. Could your new website help your organization operate more efficiently by adding features? Can it automate tasks your team is currently doing offline? Be clear on the scope of functionality requirements, and asset & content needs.



## **Extra Features**

Include any optional feature add-ons and functionality that is not core to the website but that your team would like to explore. This allows agencies to break out these costs separately from the main project deliverables.



## **Project Specifics**

You'll definitely want to include your scope of deliverables, expected timeline and your budget (more on this later) for the project.



## **Proposal Requirements & Process**

Outline your timing and phases of the RFP process. Be specific about what you expect to see in the response such as a company background, relevant case studies, team bios, and technical specs. What is the process for selecting a vendor? Who are the decision makers on the proposal review committee?



## **Communication Opportunities**

Tell agencies how they can contact you with questions about the RFP. Is there an opportunity for agencies to connect with you before sending in a proposal? Are you open to calls, emails, or a virtual meeting?



## **Evaluation Criteria**

Guide agencies in pre-qualifying the opportunity by sharing what the agency requirements are and telling them how you'll be evaluating their proposals. Do you only accept domestic or local proposals, or are you open to accepting proposals from national or international agencies? Do you require certain industry expertise from the agency?

# Common pitfalls to avoid

## More is not more.

RFPs often have super lengthy, drawn out paragraphs and tons of extra pages that can make it difficult for agencies to determine what's most important. Find the balance between providing useful details while avoiding information overload.

## Don't ask for free work.

Don't over-reach for deliverables in the proposal phase. Asking for spec work or advanced technical consultation can turn away qualified agencies who would otherwise be a great fit. Smart agencies know spec work provides little value, because we must diagnose the problem before coming up with a solution.

## Avoid standardized proposal forms.

Let agencies be creative and showcase their brand and team personality. By submitting responses in their preferred proposal format vs. filling out standardized forms, you'll get a glimpse of their creative potential, not just their boiler-plate answers.



## Having no budget is a no-go.

Do you really have to include a budget? Won't all the agencies just build the proposal to the max budget even if they could have done it cheaper? The best agencies are open to having honest, transparent conversations about budget and scope. If an agency wants to be your partner and collaborator on a project, they are often open to discussing, negotiating and being flexible on costs.



# What makes website RFPs different

You know your business inside and out, but technical expertise may not be your strong suit. So how do you write RFPs for a technically advanced audience? What's more, how do you evaluate and compare their technical prowess? This is what makes writing a website RFP especially challenging for many organizations.

It's ok to not have all the answers from a technical standpoint. If you don't know specifics on the platform and functionality, simply state that in the RFP and ask agencies for their recommendations. Chances are agencies will have their preferences and solutions for what they would include in the build.



**When comparing multiple seemingly similar digital agencies, here are some questions you can ask to get a better sense of their capabilities:**

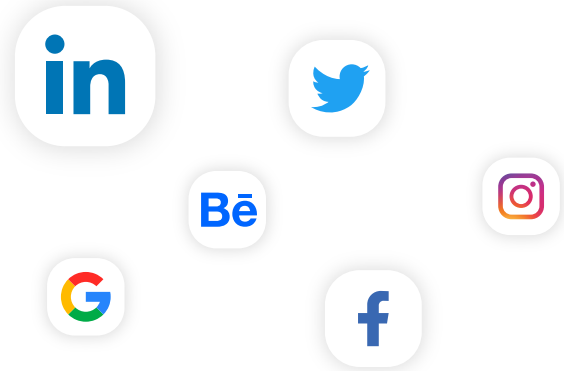
- ▶ What is your preferred CMS and why?
- ▶ What are your strengths in building websites?
- ▶ What is your process for web development and at what stages do you involve the client?
- ▶ Do you outsource design and development?
- ▶ What quality guarantees does your agency have for the website?
- ▶ What are some projects you've completed that are similar in scope?
- ▶ Do you provide services outside of website development?
- ▶ What is involved in your website support and maintenance?

# Looking for digital partners

## Make your RFP findable

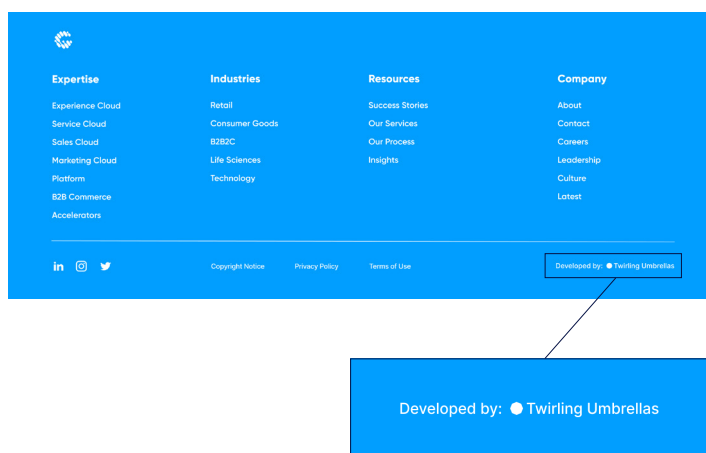
To get an ideal mix of responses from suitable agencies, you'll want to post your RFP on the most relevant channels.

- ▶ Share your RFP on LinkedIn and ask your network to recommend their favourite creative or technical teams
- ▶ Post on your company's website and social channels
- ▶ Post on online RFP databases and directories



## Bring your RFP to them

You can also search for and reach out to top agencies whose work you admire:



- ▶ Find some websites you love and figure out who built them. An agency link is usually mentioned in the website's footer. Or you can reach out to the company itself to ask who their digital agency is.
- ▶ Search online for digital agencies that have expertise in your industry or desired platform.
- ▶ If proximity is important to you, you can also refine your search to agencies in your region, province, state, or country.

# Figuring out the right fit

## Go beyond the numbers

Agencies often hear stories of clients frantically flipping to the last page of a proposal to see the cost. There has to be more to it than that. Seek out an agency that has proven expertise and success with similar sized projects to yours.



Look closely at their portfolio. Do the different websites have a diversity in styles and function, or do they all follow a similar template? This will give you an indication of the agency's ability to adapt the solution to your brand.

## Go beyond the proposal

Of course the proposal itself matters. You're looking for a proposal that is tailored to your specific ask, not just one that swapped in your company name for someone else's. But it's also important to get to know the people behind the proposal.

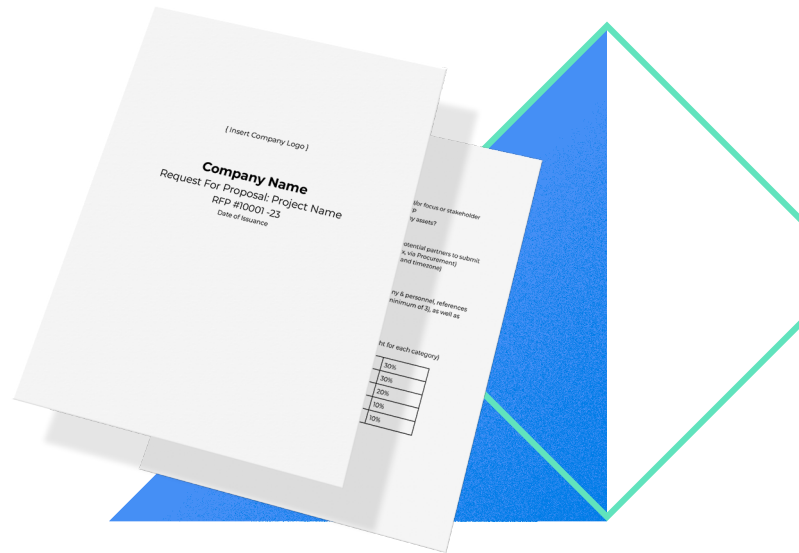


Set up a meeting. By taking the time to meet in-person or virtually, you'll get an immediate vibe check. You'll get to see their personality and passion for your project - what it's all about.

# Get started with our RFP template

You can use this template as a jumping off point for your website RFP and tailor it to the needs of your company.

[Here's the link →](#)



## Need some help?

Now you have all the tools to get your awesome RFP into the hands of the agency that's right for you. If there's anything we can do to help you create your website RFP, don't hesitate to reach out.

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