

How to Write a Request for Proposal, with Template and Sample



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Whether you're working for a small agency or a major marketing firm, you're probably eventually going to need to fill out a Request for Proposal, or RFP.

Your company can't do everything internally, and when your business needs to purchase a product or service from elsewhere, you might need to shop around. An RFP allows you to collect offers from various vendors and select the vendor that best meets your criteria, both in regards to skill and budget.

Here, we've provided an RFP template you can follow for initial structure, as well as a sample RFP for further inspiration. But it isn't one-size-fits-all -- you'll need to tailor your RFP to best articulate your company's needs.

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RFP Template:

Project Name or Description:

Company Name:

Address:

City, State, Zip Code:

Procurement Contact Person:

Telephone Number of PCP:

Email Address of PCP:

Fax Number:

1. Background/Introduction
2. Project Goals and Scope of Services
3. Anticipated Selection Schedule

6. Elements of Proposal

7. Evaluation Criteria

8. Possible Roadblocks

9. Budget

Request for Proposal [SHORT]

RFP: [Project Name]	Proposal Due By: [Date]	[Company Name]
Project Overview: [Insert Project Overview]		
Project Goals: <ul style="list-style-type: none">• Goal 1• Goal 2• Goal 3		
Scope of Work: [Describe Scope of Work in Greater Detail]		
Current Roadblocks and Barriers to Success <ul style="list-style-type: none">• Roadblock 1• Roadblock 2• Roadblock 3		
Evaluation Metrics and Criteria <ul style="list-style-type: none">• Criteria #1• Criteria #2• Criteria #3		
Submission Requirements <ul style="list-style-type: none">• Requirement #1• Requirement #2• Requirement #3		
Project Due By: [Enter Project Due Date]		Budget: [Amount]
Contact: [Enter Name]	Email: [Enter Email]	Phone #: [Enter Number]

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1. Background/Introduction

In your introductory paragraph, you'll want to include useful background information about your company -- who founded it, what product or service your company offers, what sets you apart from competitors, and where you're located. If any vendor is serious about working with you, they'll want this information before moving forward.

2. Project Goals and Scope of Services

Next, you'll want to outline the project you need completed, and the goals you expect to accomplish from the project. It's important you get as specific as possible -- even outlining individual tasks and criteria involved. You'll want to include phrases such as, "The award will be given to X firm", with the "X" establishing how you'll determine the best candidate.

3. Anticipated Selection Schedule

It's crucial you include a detailed schedule, so vendors know if they can meet your deadlines. You'll also need

Similar to paragraph #3, this is important information you'll want to clearly present, so vendors know how and where to submit themselves for consideration.

5. Timeline

By including a time frame in your RFP, you're able to eliminate any vendor who can't work within your time constraints. If you're flexible on your time, you can write something like, "Our company hopes to finish the project within six months, but we're open to negotiation for the right candidate."

6. Elements of Proposal

If you don't outline clearly and specifically what you expect bidders to include in their proposal, you can't necessarily fault them if they don't include it. It's critical you outline a checklist so vendors know which elements you're expecting to receive. It's also a good test for who's capable of handling your demands -- if a vendor can't complete all elements of your proposal, you probably can't trust them to finish your project, either.

7. Evaluation Criteria

Outlining your expectations will help eliminate vendors who don't meet them. For this section, you'll want to do some brainstorming with your team to come up with a mandatory list of items you feel are the best indicators of impressive candidates. Your list could include samples of past work, a proven success record with companies in similar industries, the expertise and technical skills to meet your demands, and a cost of services within your price range.

8. Possible Roadblocks

Here, you'll want to outline any roadblocks, such as limited resources or a custom website, that might prevent certain vendors from successfully completing the project. This allows you to eliminate unsatisfactory bidders, and it will also help you determine which vendors have the skills and expertise to tackle those challenges.

9. Budget

Any vendor needs to know how much you're able to pay them for their services before they'll move forward with their bid.

RFP Sample:

Project Name or Description: Marketing Services

Company Name: Caroline's Websites, Inc.

Procurement Contact Person: Caroline Forsey

Telephone Number of PCP: 227-124-2481

Email Address of PCP: cforsey@consulting.com

Fax Number: N/A

1. Background/Introduction

Caroline's Websites, Inc. is a web design firm created by Caroline Forsey in 2010. Caroline's Websites, Inc. prides itself on a team-oriented, solutions-based approach to web design. We provide our clients with web design services including coding, development, and branding. Our staff is located in two offices in Massachusetts.

2. Project Goals and Scope of Services

Caroline's Websites, Inc. is seeking the services of a full-service communications and marketing firm to develop and execute a comprehensive integrated marketing plan that increases our SEO presence; attracts more social media followers; and effectively completes a lead generation campaign. The award will be made to a responsive and responsible firm based on the best value and professional capability.

The selected firm will be responsible for the development and implementation of a comprehensive and cost-effective marketing plan.

Tasks include but may not be limited to the following criteria:

- Lead generation campaign
- Paid media strategy
- Production of creative material including collateral and direct mail
- Online marketing campaign
- Website enhancement
- Search engine optimization
- General account management
- Other communications and/or marketing-related assistance as required

3. Anticipated Selection Schedule

The Request for Proposal timeline is as follows:

Selection of Top Bidders / Notification to Unsuccessful Bidders: July 31, 2018

Start of Negotiation: August 5, 2018

Contract Award / Notification to Unsuccessful Bidders: August 31, 2018

4. Time and Place of Submission of Proposals

The RFP will be posted on our website, Carolinewebsites.com, and can be downloaded from there directly as of 10 a.m. on June 1, 2018.

Respondents to this RFP must submit one original and five copies of their proposal. Responses must be received no later than July 25, 2018. Responses should be clearly marked "RFP-MarketingServices" and mailed or delivered to the contact person listed above.

5. Timeline

Caroline's Websites, Inc. needs the project completed within 8 months.

6. Elements of Proposal

A submission must, at a minimum, include the following elements:

- Description of the firm that includes a general overview, names and credentials of creative team, number of full-time employees.
- A one-page narrative outlining the firm's strengths and distinguishing skills or capabilities as they might relate to Caroline's Websites, Inc.
- A representative selection of social media ads, direct response material, collateral, and website development created for current and past clients.

7. Evaluation Criteria

The successful respondent will:

- Have been operating continuously as a marketing agency for a minimum of 24 months and possess full-service, in-house capabilities for marketing, creative services, production, media planning and placement, direct response and research.
- The education, experience, knowledge, skills, and qualifications of the firm and the individuals who will be available to provide these services.
- The competitive cost of services.
- The expertise of the firm in working with similar customers.

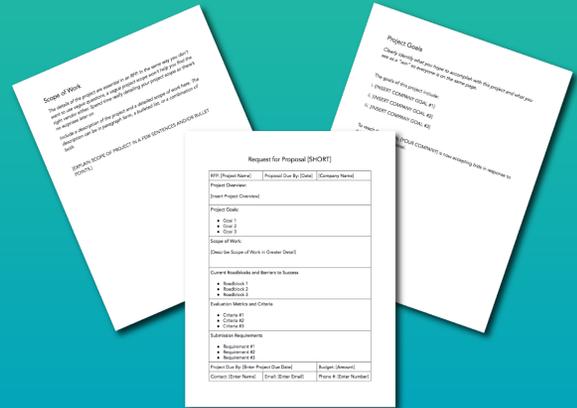
9. Budget

Caroline's Websites, Inc.'s budget for the project is \$8,750.00.

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