RFP TEMPLATE FOR DIGITAL ANALYTICS SERVICES

Request for Proposal - SECTIONS TO INCLUDE
PURPOSE: Provide the prospective analytics firm with a complete background on the company, including services required, current status relevant to needs, short and long-term goals and objectives, any requirements that may impact or limit participation in the RFP process.

ABOUT [YOUR COMPANY NAME]
- A summary of your company issuing the RFP, history, size, etc.

SERVICES REQUIRED
- Define the current status of the organization as it relates to your RFP.
- Define your needs, and invite respondents to pose questions to you (allow 1-2 weeks for questions to come in)

PROJECT CONCEPT AND OBJECTIVES
- Specifically outline the request including timelines, deliverable expectations, budgets, etc.

RFP RESPONSE REQUIREMENTS
- Specify the requirements for submitting a proposal, including timelines, submission documents required, etc.

LEGAL DETAILS INCLUDING CONTRACTING PROCESS
- An important section to simplify the contracting process; enable the prospective services provider to review your legal documents and processes early, to save time later.

OVERARCHING DETAILS
PURPOSE: Get a strong understanding of the services provider's business. What are their specialties? Look at everything from years in business to size of teams and through to core services and examples of clients and work performed. This section should have a few key questions but also allow the respondent to offer additional information.

EXAMPLE: Briefly describe your company's history including:
- When your company was founded
- Summary of staff base (i.e. high-level full-time staff, locations, etc.)
- Office locations
- Management team
- Description of products and services

KEY RFP QUESTIONS
PURPOSE: Provide a set of questions that are very specific to your needs. Focus on the high level outcomes and be sure not to get too granular or tactical.

Demonstrate your agency's relevant experience, including anything specific to our industry. (**Note: Industry experience is great to have, but it's often less about the industry and more about the techniques, data science applications, and channels used (i.e. web, social, mobile, etc.*))

What do you think will be the biggest challenges with the requirements outlined in the RFP?

Briefly explain your relationships with key applicable vendors:

- [MODIFY LIST BELOW WITH PRIMARY TOOLS RELATED TO THIS RFP]
    - Google for Google Analytics Premium
    - Adobe for Adobe Analytics
    - Tableau
    - Tealium

Briefly explain industry partnerships:
(*This section speaks to a firm's roots in the industry, and you're looking for someone who has solid relationships in key areas like marketing technology*)

Demonstrate your experience with:

- [ITEMS CRITICAL TO THE REQUIREMENTS]
    - Auditing / deploying analytics implementations
    - Supporting User Experience Testing
    - Supporting A/B Testing
    - Working with Tag Management Solutions
    - Providing training

Please provide the following information:

- Methodology and approach.
- Specific list of the deliverables your agency will deliver if work is awarded.

Briefly explain your Project Management processes.

- Do you provide Project Manager / Account Managers?
- What reporting tools do you use?
- How do you keep clients up-to-date on the status of the project?

What segments, metrics, and granularity can be reported?

How often can reports be provided?

Who will own the accounts and data?

What do you require from us to ensure a successful partnership?

What are some examples of your Digital Marketing/Digital Analytics thought leadership?

What is your depth of experience working with Adobe Analytics?

What experience do you have with the Adobe Marketing Cloud? Which products? What experience do you have implementing and using the Marketing Cloud ID?

Describe at least one difficulty that was encountered during implementation and how it was overcome.

ONGOING CONSULTING SERVICES
PURPOSE: Provide the prospective firm with an opportunity to outline how they'd support your ongoing needs. While your current needs and budgets may not support this, it's worthwhile getting a sense of how this firm could provide services on a longer-term basis as the needs of the organization change and grow.

Beyond the primary scope of this RFP, provide recommendations for ongoing consulting services.

[Be sure to state if Ongoing Consulting Services is a formal part of the RFP or more for information gathering.]

TRAINING
PURPOSE: Provide an opportunity to summarize their current training offerings. While you may not be seeking training services in this RFP, it's good to know what experience they have providing in-person and online training across a variety of topics.

Provide a summary of your company's experience delivering training through in-person and online formats.

Briefly describe existing courseware.

Provide a summary of options for customized training.

[Be sure to state if training is part of the RFP or just as part of the information gathering.]

TEAM, MEETINGS AND ACCOUNT MANAGEMENT

PURPOSE: To gather information about the types of roles and resources within the firm and learn about their approach to Account Management and Project Management. Focus on the diversity of the skills and experience rather than on the specific individuals. There's no guarantee that these resources will still be available by the time the RFP process is complete, but you can get a good idea of the skillsets and expertise across the firm's pool of talent.

Identify the people who may be assigned to this account by position title, encompassing the following:

- Delivery team (day-to-day activities)
- Relationship management
- Project management
- Oversight
- Contracts, SOWs, and MSAs

Please demonstrate the individual's qualifications for this work, documenting overall experience, education, and expertise with short-form resumes/biographies. Do not exceed one page per person.

Include an organizational chart for the management and personnel that will be assigned to this account, if applicable. [OPTIONAL]

How often do you meet with clients in-person? By phone?

SUBCONTRACTORS

PURPOSE: Get a strong understanding of how the firm will deliver work through staff and contractors. Often, consulting firms will have numerous contractors and will outsource work overseas.

Identify all proposed subcontractors, if any, and document which portions of service will be performed by subcontractors and their ability to perform the work.

Additionally, respondents should submit short resumes/biographies of proposed subcontractors' key personnel.

Resumes/biographies should detail education, experience, and key timeframes for all contractors on the account.

The use of subcontractors is subject to approval by [CLIENT] Project Authorities.

PRICING

PURPOSE: To get an outline of fixed and variable costs as defined by the firm, given the needs outlined in the RFP. Pricing may include sections for the optional items such as Ongoing Consulting Services and Training.

Please provide an outline for all costs related to each service and for each recommended resource. Include relevant variables such as timelines, ranges of costs, and fixed versus variable costs.

Where applicable, provide a breakdown of project milestones and invoicing amounts per milestone.

CASE STUDIES / PROOF POINTS
PURPOSE: Validate that the firm has experience that aligns with your organization's needs. Asking for case studies upfront can save time in evaluating responses.

Provide 1-2 case studies or proof points around the following:

- [NEEDS MAY INCLUDE]
  - Google Analytics
  - Adobe Analytics
  - User Experience Testing
  - A/B Testing
  - Each service pertinent to the RFP

REFERENCES
PURPOSE: This will give you a chance to see what types of companies the firm has built strong relationships with and find out what they’re like to work with. Focus less on the specific technical and tactical things, and more on how the relationship was managed and how responsive the team is to client needs.

Provide full contact information (full name, title, company, telephone and email) for 2 - 3 client references which involved similar scale, scope and complexity.

CONFLICT OF INTEREST
PURPOSE: To identify how the company would handle a situation when working with a prospective competitor. Is the company able to apply different resources to each relationship to avoid conflict of interest?

Provide a summary of how you manage conflict of interest if and when you deal with direct competitors to [COMPANY].

OPTIONAL:
List all related clients for whom you have acted in during the past 12 months.

OR

Confirm if you have active relationships, or have had within the past 12 months, with any of the following direct competitors:

[Provide list of competitors]

You must certify that there are no conflicts of interest between any existing contracts. Client relationships that could potentially be a conflict of interest must be listed together with an explanation of how the firm will resolve the potential conflicts.

RESPONSE EVALUATION AND CRITERIA
PURPOSE: To provide clarity on the evaluation criteria for the RFP. Some firms will not respond to RFPs where criteria are vague, or is based on price alone.

An evaluation team will review and determine which response(s) best meet [CLIENT]'s requirements. The responses will be evaluated based on a number of criteria including, but not necessarily limited to the following, nor weighted in the order shown:

- Prior experience and industry reputation of the vendor in successfully providing similar services.
- Technical capability, including scalability and the ability of the solution to integrate with existing platforms.
- Demonstrated understanding of [CLIENT] current strategic goals and needs.
- The vendor’s ability to meet or exceed [CLIENT] requirements.
- The overall cost effectiveness of the proposal.
- The completeness of the response with respect to the RFP information requested.
- The ability to work in a business relationship with [CLIENT].

PROPOSAL SUBMISSION REQUIREMENTS
PURPOSE: Be clear about submission requirements. Do not ask for printed copies as it is more time consuming, bad for the environment, and increases costs unnecessarily.

Each bidder is required to provide an electronic version of the all submission documents. Electronic versions of the proposal must be in PDF format and emailed to [rfps@client-domain.com]. Proposals may not be faxed.

The primary contact for all submissions is as follows:

CONTACT NAME
CONTACT TITLE
CONTACT ADDRESS
CONTACT PHONE
CONTACT EMAIL

LEGAL DETAILS INCLUDING CONTRACTING PROCESS
PURPOSE: Legal processes can take a lot of time to get in place, and delay the project unnecessarily, especially if your legal team is not open to feedback. Save time by providing these documents up front and stipulating what is open for discussion and what is not. Doing this last minute or upon contract award can halt progress on a new relationship quickly.

Provide sample documents to the firm for review, some of which may include:
- Non-disclosure Agreement (NDA)
- Master Service Agreement (MSA)
- Statement of Work (SOW) samples

IMPORTANT: be sure to state where there are items that are non-negotiable in this process as it will make for a seamless transition when the contract is awarded. .

APPENDIX A

Existing Ecosystem

For the purposes of this project, the focus is on those partners that supply the vast majority of digital services supplying measurement data, which include:

Analytics:
- Google Analytics
- Google Search Console / Google Webmaster Tools
- Adobe Analytics

Paid Media:
- Kenshoo
- Doubleclick
- Adwords
- Bing Ads

Owned Media:
- Hootsuite

- Facebook
- Twitter
- Instagram
- YouTube

Customer Relationship Management
- Salesforce

SAMPLE TACTICAL QUESTIONS:

The following is a list of questions that are useful once an engagement has been started, or as you narrow down to a final vendor - just to get that last piece of mind.

- We listed our technical requirements and current systems and toolset, but what additional technology would you use or recommend for tracking our sites? Do you have opinions on other major analytics platforms and which ones might be a better fit for us?
- What type of “data layer” would you recommend using to collect data from the sites and populate within Dynamic Tag Manager?
- What is your experience level working directly on page templates within Content Management Systems?
- Which CMSs have you worked with?
- How do we best integrate marketing, sales, and financial data from multiple sources into a reporting layer that can be shared internally?
- Assuming [CLIENT] is relatively unsophisticated in its collection and use of web analytics data and marketing-specific data science in general, what topics in analytics and data science should [CLIENT] should be looking into? (e.g. “Big data,” social analytics, etc.)
- Other than dropping a simple tag for the tag management system, what other work within the CMS and/or page templates do you foresee being necessary?
- How should [CLIENT] teams that don’t currently support e-commerce measure success online then link those success events to financial measures like sales, revenue, and profit?
- What strategic analytics and reporting recommendations do you have for a company like [CLIENT] that has multiple websites, brands, and such a diverse product portfolio?
- Can you provide samples of cross-channel reporting?
- Can you provide samples of website performance reporting?
  What reporting alerts or notifications are available?
- How will you integrate with our analytics or attribution platform?
- How do you integrate information from data feeds?
- What is the average lead-time for a custom report request?
- Are there additional costs for custom reports?
- How do you track performance for each service?