



THE WEBSITE RFP

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TRANSCRIPT

When it comes to using an RFP to hire a website designer, most agencies don't like them and some outright refuse to consider responding at all. And we get why — when the RFP process is conducted poorly, then frankly, it's an annoying waste of time for everyone. (No exaggeration, we have received 45-page RFPs asking 75+ mostly redundant questions!) But when the process is done right, they can be a great way for a company and an agency to determine whether they're the right fit; some of our favorite clients and most advanced websites came to us through an RFP.

WELCOME

Welcome to Gravitate, and thank you for attending our webinar on using an RFP to hire a website agency. Today we will be touching on:

- » why you should identify what you really need with your new website in order to craft the right RFP
- » how to create a more efficient, effective process for selecting an agency
- » a sample of an effective RFP

As a follow-up, you will receive an email with links to resources for writing a website redesign RFP.

This is the second in a series of webinars that Gravitate will be hosting over the next few months. It's an activity we were doing regularly back in 2012 but lapsed for a bit, and now we're resurrecting the tradition.

INTRODUCTIONS

My name is Lynn Elyse, and I'm here with my colleague Flynt Johnson. We've both been New Business Consultants at Gravitate for nearly four years now, which means we spend most of our time talking with people in varying stages of readiness for hiring an agency to redesign their website or perform SEO and digital marketing. The funny part is that since Gravitate only brings on one or two new clients each month, we spend the vast majority of our time talking with people who will probably never be our clients.

Our conversations with people go beyond simply talking about our services. In fact, we probably spend far less time talking about our services than we do listening to people express their hopes and frustrations not only with their website, but also about their overall marketing effort.

Over the years, we both came to realize that between the two of us, during these conversations, we've accumulated knowledge that's valuable to a lot of marketing managers, and we figured, why not share it with everyone? So that's the reason we're participating in the Gravitate webinar series, and we hope you will gain insight today that you'll be able to apply immediately toward your work as a marketer.

WELCOME

Begin with the end in mind.

-Stephen Covey

AGENDA

TOPICS

1. Clarify your needs
2. Follow an efficient, effective process
3. Resources for writing RFPs

Q&A

TRANSCRIPT

THE TRUE VALUE OF USING AN RFP

When it comes to using an RFP to hire a website designer, most agencies don't like them, and some outright refuse to consider responding at all. And we get why: when the RFP process is conducted poorly, then frankly, it's an annoying waste of time for everyone. (We can both tell you stories about 45-page RFPs asking 75+ mostly redundant questions—no exaggeration!) But when the process is done right, they can be a great way for a company and an agency to determine whether they're the right fit. Some of our favorite clients and most advanced websites came to us through an RFP.

The second most important thing to know about an RFP is this: the value in using an RFP process to select a website agency isn't what you think it is. Many people think that an RFP will give them the most value for their dollar—they'll be able to make an apples-to-apples comparison and choose the option providing the most features at the lowest cost. You know, that might work when you're buying a product, but it's useless when you're buying a service.

The #1 thing to know about an RFP? The highest value of an RFP process is confidence that you've selected the right agency to do the right work.

For a salesperson, do you know what's even worse than hearing "no" after proposing to do business? It's hearing nothing at all. That tells me that the person I've been talking to has a confidence problem:

- » unconfident that the right problem has been identified
- » unconfident that the right solution has been presented
- » unconfident that there's a vendor who can implement the solution on time and on budget

A thoughtful RFP process can erase doubts, because it will help you to:

- » gain insight into your own organization and the problems you're facing
- » confirm your true needs
- » become clear-eyed about your own level of readiness for the project and the effort you must put into the process
- » identify the website partner who offers the right solution for the right problem

CLARIFY YOUR NEEDS

Your RFP should articulate problems and needs — it should NOT dictate a solution.

The main purpose of just about any website is to accelerate a sales process.

B2B more, better leads

Financial Services... more, better accounts

Healthcare more, better patients

E-commerce more, better orders

Government more, better engagement

Non-profit more, better donations

BEGIN WITH THE END IN MIND

Okay, so this all sounds great, but how to get started?

Well, you need to start with the end in mind. And when I say “end,” I don’t mean the day the new website launches. I mean that you should envision how the website will help to achieve your organization’s goals six months after launch, or one year, or two years, or even more.

So, first visualize how you want that tool to be working for you a year from now, and then identify the barriers in the way of that vision. The main purpose of just about any website is to accelerate a sales process—and if you’re a non-profit, government agency, or other entity that doesn’t “sell” anything, don’t let the terminology distract you. Everyone is selling something.

What are all the problems that are preventing you from getting more of whatever it is you want? Which fall under the marketing umbrella? Which of those might be addressed with digital marketing? Once you can articulate those bigger-picture problems, you’re ready to get started on your RFP process.

We really can’t overstate the importance of identifying problems. The number one mistake we see with RFPs is when they dictate a solution instead of stating a problem. You’re hiring an agency for their expertise with interactive design and online behavior—let them do their job! Identifying problems leads to articulating needs; your ultimate goal will be to explain your needs in the most helpful way possible.

HOW TO STATE NEEDS

Do this:

- *Amplify the brand image*
- *Ensure that buyers and researchers find company when considering solutions*
- *Convert browsers to qualified leads who fill out forms to engage with sales*
- *Deliver high value information that will convert anonymous browsers to identified leads*
- *Provide information that will help educate anonymous buyers as they begin their research process*
- *Keep current customers updated*

Don't do this:

- Rotating images on the home page
- Main menu
 - Home
 - About
 - Products
 - Services
 - Contact
- Live chat link
- Contact form on every page

This is an example of how to state needs in a useful way.

HAVE A SMART PROCESS

The time it takes an organization to select an agency is a gauge of the time it will take to complete the website project.

Optional: 8 - 10 candidates » Talk with them	Influencer	2 weeks
Select 2 - 4 finalists » Talk with them	Influencer (Decision maker)	2 weeks
WRITE RFP	Influencer Decision maker	1 week
DISTRIBUTE RFP » Talk with them	Influencer	2 - 3 weeks
READ RESPONSES	Influencer (Decision maker)	1 week
INTERVIEW	Influencer Decision maker Others	2 weeks
Optional: Contact references	Influencer (Decision maker)	1 week
SELECT & NEGOTIATE	Decision maker	1 week

CREATE MOMENTUM WITH A SMART PROCESS

The time it takes an organization to select an agency is a gauge of the time it will take to complete the website project. We've had companies take six months to select an agency, and then want a custom website completed in two months. Guess what? It's not going to happen! They've got internal dynamics that I guarantee are going to drag it out.

Before you ever start writing the RFP, map out the full process so that you don't lose momentum. At the absolute maximum, your RFP process should take three months; two months is a better target.

When you drag out the process too long, you lose valuable momentum.

Items to note:

- » Notice the suggestion to talk with prospective vendors before you write the RFP. This is both a time-saver (Are you really going to read 20+ RFP responses? Do you really need to specify "responsive design" when every legitimate website designer does it as a default?) and it will help you identify your real problems and needs.
- » Think twice about whether you really need to contact references; it's time-consuming and is of limited value. Consider the last time you looked for a job: did you provide any bad references? Agencies are the same way: "We're going to give you our raving fans (and we don't mind doing that, but we want to respect our clients' time and would prefer not to turn providing a reference into a part-time job.)"
- » Involve the decision maker as often as you can. We get why most decision makers want to stay scarce, but it prolongs the process and forces the influencer into the role of translator.

RESOURCES

Writing an RFP shouldn't be hard. If you're finding it difficult, it's a sign that something is wrong.

Possibility 1 **YOU'RE TRYING TO DICTATE THE SOLUTION**

Possibility 2 **YOUR MARKETING BASICS ARE NOT IN PLACE**

Possibility 3 **YOU'RE INVOLVING THE WRONG PEOPLE IN THE PROCESS**

TRANSCRIPT

THE ONLY RFP-WRITING RESOURCE YOU REALLY NEED

Once you've defined your needs, mapped out your RFP schedule, and assembled the participating parties, it's time to write the RFP. We'll provide you with some resources, but the truth is, writing the website RFP shouldn't be hard. If you're finding it difficult, it's a sign something is wrong: you either don't really know what you need or you're trying to dictate the solution. Or, you're involving the wrong people in the process.

RESOURCES

The following pages have the only RFP-writing resources you truly need, based on one of the most efficient and effective RFPs among the hundreds we've received over the years.

There is both a sample RFP and a template.

Thank you for your time today, we hope you found the information useful. We'd be happy to address your individual questions, just email lynn.elyse@gravitatedesign.com or flynt.johnson@gravitatedesign.com. Both of us have blogged additional thoughts on writing RFPs:

- » www.gravitatedesign.com/blog/how-to-write-rfp-website-design
- » www.gravitatedesign.com/blog/write-a-smarter-website-rfp
- » www.gravitatedesign.com/blog/write-a-smarter-website-rfp-part-ii
- » www.gravitatedesign.com/blog/rfp-donts-avoid-these-common-mistakes

SAMPLE RFP

Company invites your agency to submit a proposal to design and develop a new version of our website, www.company.com.

Proposals must be presented to Company by November 10, 2014. (See the timeline at the end of this document for additional information.)

ABOUT COMPANY

Net lab iderumquam coninnagni con cus, sam hillam quame nos ero estiae nensenimus ilicitisziis porias nis volut atur? Ebiti doluptaturis assequis sant unto ex et adi seque plita es eum verias expeliqne parum faceaque et estisszquasi as et et, simum estem. Hicillecepro ea sinulpa auta del inulles et, consequam ratem...

OUR TARGET AUDIENCE

At the highest level, Company's current customers and prospects may be divided into retail and manufacturing, with particular strength in the areas of fashion / apparel, consumer electronics, appliances, CPG health and beauty, and sports.

KEY INDUSTRY SEGMENTS INCLUDE

- Retail
 - Fashion / Apparel
 - Sports
 - Big Box
 - Specialty
- Brands (manufacturers)
 - CPG
 - Health and beauty
 - Food and beverage
 - Fashion / Apparel
 - Consumer Electronics
 - Appliances
- Financial Services
- Banking
- Insurance

Revenues for these companies are typically more than \$1.00MM.

Our target audience is primarily marketing and ecommerce executives. Their titles may include CMOs and VPs of marketing, ecommerce, insights, or web experience. In manufacturing, titles may include brand managers or executives. 60% of current website visitors are between the ages of 18 and 34. 46% are female; 54% are male.

KEY MESSAGES

- Benefit company provides
- Benefit to the company's solution
- Company's differentiators
 - Benefit 1
 - Benefit 2
 - Benefit 3

KEY COMPETITORS

- Competitor 1 - Our primary competitor, strengths and weaknesses.
- Competitor 2 - strengths and weaknesses.
- Competitor 3 - strengths and weaknesses.

WEBSITE OBJECTIVES (in relative order of priority)

- Amplify the brand image:
 - strong
 - active, in tune, and engaged
 - design and technology savvy
 - fun
- Ensure that buyers and researchers find Company when considering solution
- Convert browsers to qualified leads who fill out forms to engage with sales
- Deliver high value information that will convert anonymous browsers to identified leads
- Provide information that will help educate anonymous buyers as they begin their research process
- Keep current customers updated and engaged to ensure renewals and encourage upgrades
- Support recruiting efforts

WEBSITES WE LIKE

- Website 1 - why
- Website 2 - why
- Website 3 - why
- Website 4 - why
- Website 5 - why

KNOWN REQUIREMENTS AND SCOPE

- Design, templates, and website style guide that ensure a consistent look and feel that supports the brand image, including our logo as well as corporate colors and fonts.
- Information architecture (navigation, structure, and site map)
- Integrated with Salesforce CRM
- Pages should be updateable (including copy and images) by the marketing team without HTML or other coding (the home page may be an exception)
- Responsive design (~8% of users visit on tablet; ~22% of users visit on mobile devices, 60% of those are iOS)
- Google Analytics tracking
- SEO for all pages, including XML sitemaps, robot.txt files and other unseen SEO best practices.
- Provide a content staging strategy to enable the creation, review, and approval of content in parallel to development.

YOUR PROPOSAL AND PRESENTATION SHOULD INCLUDE:

- Capabilities
- Team
- References and case studies
- What additional information you need from us before project kickoff and during the project
- Detailed description of deliverables
- Timeline and dependencies
- Pricing, including costs for the web content management system, images, or any other related costs

TIMELINE

Proposals, including timelines and terms and conditions, must be presented to PowerReviews by November 10, 2014. Agencies should be available to answer clarifying questions and/or refine the proposal November 11-13. PowerReviews will notify the selected agency by November 14.

The selected agency should expect to kick off the project no later than November 21.

KEY CONTACT

marketing.manager@company.com
123.456.7890

RFP TEMPLATE

OVERVIEW

- » One paragraph stating who you are and what you do.
- » List the URL (or URLs) that you want redesigned.
- » List any other services you may need, such as brand identity (visual and/or messaging), digital marketing (content marketing, SEO, SEM, PPC, etc.), copywriting and/or designed content, media buying, photography and/or videography, public relations, website hosting and maintenance.

MARKETING GOALS

- » List your company's sales and marketing goals. (generate leads, facilitate sales, reinforce relationships, increase orders, etc.)
- » Explain how your website fits into your overall marketing program. What are your primary marketing pursuits and how will they integrate with the website?
- » Explain your frustration with your overall marketing program and your current website.

MARKETING BASICS

- » Explain the state of your current brand identity and advise if you have a style guide.
- » List your key messages
- » List your key audiences
- » List your key competitors
- » Indicate the quality of your current website content, and explain your content capabilities. Do you have in-house copywriters, photographers, editors, etc.?
- » Explain any other in-house (or outside consultants / marketing partners) capabilities for design, development, or other relevant skills.

WEBSITE GOALS

- » List your quantifiable goals, such as traffic, conversions, etc.
- » List your qualitative goals, such as brand awareness, lead quality, etc.
- » List any known functionality needs, such as an open-source CMS, integration with a CRM, etc.

TIMELINE & BUDGET

- » What event, business condition or sales window will inform the optimal launch date?
- » What return on investment do you require? What is your budget range?

PROPOSAL REQUIREMENTS for AGENCY'S RESPONSE

- » Capabilities
- » Team
- » Portfolio and/or Case Studies
- » Recommended Solution
- » Description of Process & Deliverables
- » Timeline
- » Pricing

COMPANY CONTACT & PROPOSAL DUE DATE

THANK YOU