*How to Use This RFI Template*

*All green text (which is also italicized) is for your guidance and should be deleted as you complete your RFI. All parentheticals are meant to be replaced with your actual information. Note: now would be a good time to have your completed* [*Self Assessment*](https://docs.google.com/document/d/1pU7s9VJjSr3U6v5PiU4lgSmOCgPCrlo-KIFKKTghgPg/edit)*, Vision and* [*Roadmap Questionnaire*](https://docs.google.com/document/d/1meyKTvDeMVfUcf5xJAA1qi4QQYPawzwY9crxuRXI25o/edit) *in front of you.*

**RFI by (Your Company) to (Agency)**

(Your Company) Contact: name, email address, phone number

**RFI Dates**

**(date) -** RFI response documents and/or decks are **due on (date)** and should be emailed to (Contact name) at (email address).

*Note: You can either include phone interviews as part of your RFI process to begin with, or save them for the RFP process (totally up to you). If you would like to include phone interviews as part of your RFI process, we recommend you include the following with your applicable dates/times/time zone:*
**Please pick a one-hour time block (Eastern Time Zone) that works best for a call to review your response:**

January 15 – 10:00 – 1:00pm

January 16 – 10:00 – 5:00pm

January 17 - 9:00 – 5:00pm

**Request**

*This should be a lead-in, letting the agency know that you are requesting information to understand more about them.*

*Example:* We would like to request the following information to help us gain a better understanding of your agency’s experience, body of work, project management, and culture.

**Challenge & High Level Requirements**

*This should pique the agency’s interest by giving them a high-level snapshot of the problems you’re hoping they will help you solve. If you’ve followed the steps in the* [*Agency Buyer’s Guide*](https://docs.google.com/document/d/1qXIXVQPrXbTa56bgS4p2PEsOSqs2OgyKIzkMyF6dYAw/edit)*, then:*

1. *Take a quick look at the vision you’ve created, and consider providing a few sentences about where you are today vs. where you hope to be in the future.*
2. *Use the first two questions you answered in your* [*Self Assessment*](https://docs.google.com/document/d/1pU7s9VJjSr3U6v5PiU4lgSmOCgPCrlo-KIFKKTghgPg/edit) *to address specific goals and your top priority*

*Example:* Spurious has focused on marketing on the West Coast, and does not have traction beyond the western half of the U.S. We are rolling out a new product, and seeking an agency with fresh ideas, and a modern approach to increasing a brand presence across the entire country in preparation for selling 1,000 new units.

The first priority is launching a campaign for Q3 that teases the new product and helps gain the brand traction in other regions across the U.S. We’re looking for someone who understands shopper marketing, ecommerce strategy, social media and digital advertising that goes beyond Google Adwords management.

**Company overview**

*This should give the agency a good idea of who your company is, and can even touch on some basics about your team. Consider a sentence or two referencing industry and target market(s) or customers served.

Even if you’re part of an iconic brand everyone has heard of, this is an opportunity to emphasize the background and points most relevant to your requirements, and what might make an agency more excited to work with you.*

*Example:* Spurious is a tech company based in Silicon Valley, specializing in augmented reality that’s being used in physical therapy for college and professional athletes . The company has been operating for 10 years, and is growing annually by 30%.

Our marketing team includes a brand manager, marketing director, two content producers and some (limited) in-house creative. Spurious is forward-thinking and always looking to be innovators, rather than followers. Additionally, Spurious products are consistently highly rated, making them a leader in the augmented reality space.

**Questions**

*This section is where the meat is, helping you learn about agency candidates without asking too much to start. Responses to these questions should help you recognize good from great, and even inform changes to the (draft) RFP you’ll send to your finalist candidates.*

*As you review the questions below, definitely consider how they apply to your actual requirements, team and vision. Thorough responses are great, but not so much when you have to review a ton of them from many competing agencies. On that note, find the balance of less being more. Don’t leave a question in that you believe won’t be that important to informing your decision. By the same token, add what’s missing as needed.*

**Experience developing strategies and content**

*Please share your experience and examples of work in the following areas:*

1. Please share examples of campaigns that your agency has deployed to help brands increase awareness and drive sales.
2. What types of strategies and visions has your agency developed for brands? Please give specific examples, as well as results of how these translated into execution.
3. When working with a brand, what kind of input do you look for from the client side?
4. How do you approach a creative challenge? Have you developed creative assets for a brand with an always-on strategy? Please give specific examples.
5. How has your agency worked with brands to define their voice, style, and mission? Please give specific examples.
6. How do you envision the tech space in the future? How do you think it will it be same/different from today?
7. What are the most common KPIs you look at to measure the success of marketing campaigns? Please share an example of what a monthly report might look like.
8. What tools do you use for gaining actionable insights? Please give a specific example of a time when you used social listening for a brand.
9. Share an example where your agency created an experience that engaged fans, customers, or prospective fans/customers in a creative way. Provide an example both on social platforms and beyond (such as a special event).
10. Describe a time you switched up a campaign by either rethinking creative, changing spend, modifying the campaign assets, etc. What were the results of your recommendation?
11. How should a brand be thinking about relating with consumers?
12. How have you delivered a genuine and beneficial experience to consumers at scale?

**Industry Experience**

*Please inform us about your agency’s experience in these areas:*

1. Please share a summary of projects that you have worked on either in or somehow related to the technology space. Please share one project that you are most proud of and explain why.
2. Which advertising and social media platforms do your agency have the most experience with?
3. Is there a way to both drive sales and give the consumer a great experience? Give examples of any experience in this space.
4. Tell us about a campaign or plan that encountered obstacles such as unexpected events or changes. What obstacles popped up, and how did you overcome them?
5. What did you learn from the above experience, and how are you applying it today?

**Agency Resources**

*We would like to understand the talent on your team and your agency culture, as well as the outside resources and connections your agency possesses.*

1. Tell us about the team and what makes your agency unique.
2. What experience puts your agency ahead of others?
3. What are your values?
4. Have you partnered with other vendors in previous collaborations?

**Compensation & Confidentiality**

*Managing costs and confidentiality are critical aspects to our project. Please help us understand the following:

This is an opportunity for you to get an initial feel for agency fees without asking for or presenting a budget. If you have no or little sense of what your budget is (or will be) from an agency fees perspective, using a RFI can be an effective way to help you determine that.

NOTE: We do not recommend using a RFP to help define a budget where there is none. If you’re giving no indication of a budget in your RFI, you should be providing a budget (or budget range) in your RFP to follow.*

1. What can you share about your fee structure?
a.) average project-based rates vs. monthly retainer / hourly rates
b.) what is your average monthly retainer fee
c.) what percentage of your revenues are from projects vs monthly recurring
d.) do you have minimums we should be aware of with respect to project and/or monthly retainer size?
e.) how do your ad management fees work?
2. Do you have any exclusivity with current clients and/or industries? If so, do you imagine that they would restrict your ability to work with us?
3. How have you managed confidentiality with past clients?

**Follow-up**

*This should wrap up the RFI. Reiterate the date of the expected response and provide a contact.*

*Example:* Please submit information no later than Friday, January 12. Please feel to contact us with any questions you may have. If interested, please contact Justin Sullivan at jsullivan@spurious.com.

*EXAMPLE EMAIL INVITE*

*The following is an example of an email invite you can use and modify to send your RFI to selected (shortlist) agency candidates.*

*Subject Line: Agency Request for Information*

*Hello,

We are searching for the right marketing agency partner to help us with (our website, social media, content marketing and online advertising initiatives).

Your agency has made our shortlist, and we are providing the attached RFI as a first step to gaining a better understanding of your agency’s experience, body of work, expertise, and culture.

If you could confirm your receipt of this, and any initial levels of interest in responding further, that would be excellent.

Many thanks,*