

RFP (Request for Proposal) Outline, Instructions & Tips for Small Business Website Projects

“Before a problem can be solved, it must first be properly defined” unknown

Let this document serve as a guideline and scope for prepping your website design (website re-design) project. Set aside a proper amount time to go through each of these points and answer them as thoroughly as possible. If you do this part correctly, the rest of the design & development process will go much smoother and you will be more satisfied with the results you receive. It is also important when seeking multiple quotes for a project that you are as consistent as possible on what you are asking a designer/developer to build for you. A written RFP is the best way to insure specs and objectives are stated clearly and consistently.

GENERAL INFORMATION

1. **Intro/Project Overview** - *List generalized information about your company and for the project you are proposing such as:*
 - a. The name(s) of your company
 - b. Include your budget range here AND again in the budget section of the RFP
 - c. The number of people involved in the design/development team
 - d. The name(s) of the decisions makers (budget, design, etc.)
 - e. If there are outside vendors involved for certain aspects of the project declare them here (e.g. graphic artists, content marketing/copy writers, etc.).
 - f. State general overviews such as:
 - i. “This is a website redesign or our exiting website at <http://mycompany.com>” OR “This is a brand new website to be built from scratch ...”
 - ii. “The new website will help us increase business online by ...”
 - iii. “We would like our website to help establish credibility with ...”
 - iv. “This website will have an online store so customers can buy products online”
 - v. “This website is a place for people to preview my artwork and ...”
2. **Company Overview** - This should be a brief company overview. This is not a comprehensive history of the company, but enough information for the vendor(s) to understand who you, what you do and who your target customers are. This section should include such information as:
 - a. The type of company you are (non-profit, corporation, sole-proprietor, etc.)
 - b. The way you make money (services, products, online sales, brick-and-mortar in-store sales).
 - c. Geographic info (Are you a local business? Do you have offices? Are you in multiple states? Are you an international business? etc.)
3. **Who is your target Market / Audience** – *who will most likely be visiting and interacting with the website? This info will make a difference in planning for*

extended requirements such as language support and expanded accessibility features. The better you know your target customer (demographic), the more focused and effective the website design can be. Consider such info as:

- a. The most likely age range or gender(s) (if known) of your target audience
- b. Any special impairment characteristics (such as visually impaired or any other accessibility issues)
- c. Income range (if known)
- d. List any geographic information if known (U.S., East Coast, Spain, Mexico, etc.).
- e. Language specifics (US English only, UK English, ESL visitors, Spanish, etc.)

- 4. If this is a website re-design, state what is not working with your current website or why you feel you need a new website (be as specific as possible). What about the current website causes you pain? Why do you feel it is not working the way you want it to? What do you hate about it (if anything)?**

SCOPE OF WORK & DELIVERABLES

- 5. New website or redesigned website objectives - list your primary, secondary and even tertiary objectives for the website. Obviously, these items should also address general features or items you feel are missing from your current website (if you have one). You can be more specific about features and functionality in the next question. Think about what the most important thing you want your website to accomplish is going to be [e.g. attract more customers, get more online sales (more conversions), get visitors to book more vacation packages, etc.). In addition, be sure you know what do want them to do when they get to your website [this will help with creating effective calls to action] (e.g. sign up for a mailing list, buy our products, make an appointment, etc.)]. What does success look like to you for this project?**

- 6. Which Features & Functions do you need? – This is where you get more specific about the features and functions that you will need in the website. The more specific you are able to be the better. This will insure that your quotes will be more accurate and you avoid any unpleasant and expensive surprises later. List such things as:**

- a. Here is a list of websites our team likes ... and these why we like them (looks, feels, or specific features).
- b. We need an online store where customers can purchase products and/or services
- c. We need an online payment system that will take payments from PayPal, Visa, MasterCard, etc.
- d. We need to be able to do currency conversions and accept payments in non-US dollars
- e. We need an online customer database that can be maintained by our staff
- f. We need a place for customers to log-in and see their orders
- g. We need to be able to process, track and ship products

- h. We need to capture email addresses for our email newsletter
 - i. Does there need to be a large photo gallery? Do you need to host videos? Do you need a forum or online customer support section? Etc.
 - j. “We need to be able to edit some or all of the content internally”
 - k. “The platform we want our website to be built is ...” (e.g. WordPress, Joomla, Drupal, non-CMS HTML, Ruby on Rails, etc.). *[Note: it’s a good idea to list why you feel you need to build on this platform].*
 - l. List hosting requirements if any (self-hosted, shared hosting, or let the developer make recommendations).
 - m. Any special security requirements needed (SSL certificates, multi-factor authentication, etc.).
 - n. Does the website need to have more than one domain name? Will there be a need for subdomains such as store.mycompany.com?
 - o. If you have a website site map prepared as part of the RFP process (desired navigation structure & list of pages) include it as an attachment, but note that you have one here.
7. **Other features** – *list any features and/or options that you are thinking about adding, but are not sure about yet. If you would like those feature(s) quoted separately, be sure to not that here and in the section on vendor response requirements. Include examples if possible of the feature(s) you are listing here (include website and page addresses).*
8. **Database, Forms and/or E-Commerce Details** – *this is critical for accurate quoting. Examples would be If you are going to have to connect with any special databases (connect to a vendor’s database), have a large database or multiple databases created (thousands of customer records or inventory), special forms & pages to pull-from and write to a database (data entry or complicated search forms), etc. In addition, if you plan to have a large online store or will require any special apps or online tools declare the size and scope of each here, otherwise your bid may be invalidated.*

BUDGET, TIMELINE & CONTACT INFO

9. **What is your budget?** – *Never approach vendors for a quote if you do not have a budget in place. Also, be sure to have that budget range approved ahead of time. Worthwhile designers and developers will see this as a sign that you are not organized or serious enough to for them to take the time to put together a proposal for your company (keep in mind, time = money for them as well). After you finish putting together your RFP, you should have a better idea of just want you are asking someone to build. Make sure you are being realistic with the budget range (forget those commercials that say your website can be built for a penny or the Craig’s list ads from India that say they can build your website for \$300). Please understand that this question will be asked and that is not a trick to*

find out how much money you have, it is standard practice – so be prepared with an answer.

10. What is your projected timeline for this project? – be sure to include the timeline for your project (e.g. do you expect this to take 3 months or a year? What is your drop-dead date / critical launch date?). In addition, include the date-range for which you would like the project to begin. Keep in mind that many design houses have current projects and may not be able to begin right away.

11. Vendor Response/Proposal Requirements – *How do you want a vendor to respond to your request? It is unlikely that a vendor will break down each element, but will most likely respond with single or multiple package prices. Do you have a special form them to use? If you want a specific part of the project broken out, list that here. You should, at the very least, require the response in writing and have it refer to the date and RFP you sent and a price expiration date (DO NOT count on a verbal quote). In addition, make sure to include your deadline for a formal response for them to be considered in the decision making process.*

12. Project and Company Contact information –

- a. List the formal business name, business address and business phone number of your company(s).
- b. List any name(s), address(s), email(s) and contact phone number(s) of those who should be contacted in regards to the project if there are any questions.

Keep in mind that building a website is only part of a comprehensive Internet Marketing strategy. A goal such as “Get more people to visit our website” is different than say “Get more people to interact or purchase products on our website”. Both of these goals involve good design, development and careful planning, but the first one has external elements involved (such as social media marketing, SEO, PPC marketing, content marketing, etc.). If you expect these elements to be part of the quote, you will need to list them separately and be sure that the vendor(s) understand that you are asking for these things to be part of the final proposal/quote.

If you know that your company needs a new website, but are not sure which features you need to include or even where to begin, I am available for consulting and discovery sessions. Please see my services page for my current rates.

Here’s wishing you and yours the best! Happy planning ☺

*Mike Baker
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