

How to write an RFP to guarantee success



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Crafting a great digital marketing RFP (request for proposal) can be a challenging endeavour. Brands are often unclear about what it is they actually require, and bureaucratic oversight can add layers of complexity to the process. However, finding the very best partner to help you achieve digital success must start with crafting an RFP that will allow your future partner to shine in the pitch process - and beyond.



Source: www.pexels.com

There's a lot on offer, be specific

The goal of an RFP is to ensure you find the best partner, vendor or supplier for your business. To achieve this you need to be very clear about the business challenges that you need them to help you solve.

Once your challenge or problem statement is very clearly defined, you can then move on to determine what services you need from your marketing partner. However, it's worth noting that some brands may not fully understand what is required to address their challenges, and in this instance, they may want to keep their RFP requirements fairly broad. The trick is to frame your RFP in terms of what it is you do know and then carefully manage the process thereafter.

A key challenge in the digital marketing space, however, is the breadth of the services offered and it is easy for expectations to be misaligned.

For instance, Incubeta provides media, tech and creative services, we consult on data and business intelligence, and we do tech licensing and digital maturity consulting. So our expectations about why a brand is looking to engage with us could come from the fact that we provide this comprehensive range of services.

However, sometimes a company may simply need the services of a good digital media agency. Being clear about this in the RFP ensures you get the most appropriate responses, streamlining the process and boosting the chances of a successful outcome, whatever your business need.

Setting up your future partner for success

The pitching process varies widely from brand to brand. Drafting an RFP in a way that best sets up your future partner to showcase their ability to solve your problem means you will be better placed to make choices that work for both parties.

One of the first things to remember is that it's important to be very realistic about your timelines and about the information that you require within those timelines. Unrealistic turnaround times lead to suboptimal presentations and will often mean a company doesn't actually uncover who is really their best future partner.

It's also important for marketing leaders and procurement departments to be realistic about the value of the work being scoped. If you are asking for R100 000 worth of work, will you ask your potential partners to jump through the same hoops as you would for a R1 million job?

Far too often there are unrealistic expectations, or in some cases badly written RFPs, which can lead to agencies putting in days or weeks of preparation for a small piece of work that would really only require them showcasing just one aspect of their delivery repertoire - in these instances a simple showreel of previous work would suffice.

CMOs and marketing leaders should also work with their procurement departments to ensure they are managing expectations. This helps potential partners better allocate valuable resources - something which is especially important when trying to manage remote teams.

Make sure you have given enough context

In order to get the most out of the pitch process, brands must ensure they give their future partners enough context about their challenges and requirements. As mentioned, this means relying on a succinct and well thought out problem statement as the basis of your document.

But it also means that a brand will need to expand on that with additional insight. This can take the form of a well structured, information-rich pitch document. The other way, which is growing in popularity, is for brands to host discovery sessions. These in-person or video meetings allow teams to spend some time with their potential client.

This almost always leads to a richer understanding of requirements which benefits both parties. In addition, syndicating answers to questions raised to all of the competing agencies during these sessions places everyone on a level playing field.

The pitch process is the start of the relationship, get it right

The very first engagement between brands and their future partners - which is most often the pitch process - will set the tone of the relationship going forward and is worth taking seriously. By agreeing on what the problem is, what success will look like, as well as how it will be measured, gives both parties the best chance to make informed decisions about who they want to work with.

In our experience, laying the groundwork for a successful partnership starts with a considered and well crafted RFP.

ABOUT NIAMH NICLIAM

Niamh NicLiam is the director for growth and partnerships at Incubeta. Niamh joined the Incubeta group in January 2015, and since then she has helped build successful partnerships with many local and global brands.

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