

A person wearing a light blue button-down shirt is sitting at a desk, writing on a document with a silver pen. The background is softly blurred, showing a window and another person in a white shirt. The overall scene is bright and professional.

**Thank You for Your Interest in
The 2017
Request for Proposal
(RFP) Toolkit**

A Letter from the CEO

Hi, this is Ryan Flannagan, founder and CEO of Nuanced Media. I want to thank you for downloading the RFP Toolkit. My team and I created the RFP Toolkit because we know writing a website RFP can be a difficult and frustrating process. Throughout our years in business, we've written and reviewed hundreds of RFPs, seen all the mistakes and missed opportunities. From these, and other experiences, we've discovered all the breakthrough strategies.

Website design is very different than other industries, so a general RFP just won't cut it. Most people's knowledge about website design only scratches the surface, and many think it's a fairly simple process that only includes a handful of products and services. But the web design industry is growing rapidly, constantly adding new services and strategies to help companies like yours reach your target market.

If you ask for only the bare minimum in your RFP, you may miss some golden opportunities to grow your business. No need to worry: The Nuanced Media team created an RFP Toolkit that gives you all the tools you need to find the ideal website design partner for your project. When you include our suggestions in your RFP, you'll have a clear path of communication with your agency to get exactly what you want, maximizing your project goals and your results.

Included in your Nuanced Media RFP Toolkit you will find an RFP Content Checklist and Web Design Glossary. You'll have everything you need to communicate your project needs clearly with industry words and phrases.

We wish you the best in your upcoming RFP process and remind you that Nuanced Media is at your service if you have any questions!



Cheers,

A stylized, handwritten signature in black ink, appearing to read 'Ryan Flannagan'.

Ryan Flannagan, MBA
Founder and CEO • Nuanced Media

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Why You Need an RFP

Although people argue against RFPs, especially for web design, sometimes there is no way around them. If you are or work for an organization that requires a bidding process, you will need an RFP. These include non-profits, governmental agencies, schools and very large companies with cost control policies in place. You might also consider an RFP if you know your project will be large, time-consuming and costly. If you need an RFP, you have to do it right.

RFPs provide very tight guidelines for projects, and hold all parties involved accountable. This all helps to insure your goals are met to the best of everyone's abilities and allows you and your company an accurate assessment of your needs.

Your RFP Process

- 1. Identify your boundaries, stakeholders, needs and schedule**
- 2. Write the RFP**
- 3. Review RFP and develop your scoring criteria for the proposals**
 - a.** You may score items on a 1-5 or a 1-10 scale, but some items might hold more weight - depending on your project. Is it important your agency have close proximity to your business, or experience, do you want a lot of positive reviews, or are you very strict about your budget?
- 4. Send it out**
 - a.** Send via email to agencies around your area, or nationally. There are also business portals, and RFP sites like <http://www.rfpdb.com/> that allow you to post your RFP for a variety of available vendors
- 5. Review and Research**
 - a.** Stay within your schedule
- 6. Score each proposal based on your criteria**
- 7. Choose your agency and sign**

Checklist

Introduction

State the purpose of the RFP and make sure you send out a call for bids to fully (or partially) redesign (or update) your website;

- Detail the current status of your website as it relates to style and function. Include where you host your website;
- Identify 3 to 4 overall qualities of your preferred website designer candidate;
- Include a brief description of how the candidates will be evaluated. Include a detailed list later, we will guide you through it.

Background

- **About (Company/Organization)**

- Provide the background of your organization and include your company's mission, goals, key staff bios and important industry accomplishments as well as your company's scope of work. Your website should reflect your brand, core values and company culture.

- **Project Background**

- Discuss your reasons for looking for a website design/update;
- Give a brief summary of the desired major changes from your current website. You will discuss the smaller, more detailed changes later.

Overview

- **Project Goals (Scope of Work)**

- Provide a description of your project size and the number and type of site pages;
- Identify whether you are looking for custom development or a pre-developed theme.

- **Timeframe and Budget**

- Give a desired timeframe to complete the project and a launch date for the new website. Remember, websites take a lot longer to build than most people think. Give yourself plenty of time for review, feedback, adjustments and dependencies;
- Budget—Set the expectation for your desired budget range for your website redesign. Make sure to include site maintenance, hosting, staff training, plug-ins, software integrations and any other expenses that might be included in the process.

Check it out!

Project Goals/Requirements

(In this section, clearly state your goals, requirements, and needs for the project. Be very specific so the potential agencies can propose something of value. This will result in a strong partnership and a quality product.)

- Goals for the project, such as, increase CTR, increase subscriptions, ecommerce
- What is your goal for the user? Click-through, download, sign-up, buy, donate, etc.
- Requirements for your project
- Desires for the project—What do you want, but would be willing to give up, pending

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Usage

- **Current Usage/Website Statistics**

- Detail how visitors currently use your website;
- Provide any important statistics about the website use.
Examples: high volume, concurrent usage, multinational/linguistic users

• Required Elements

- Compile a list of your expected final deliverables, including the required sections of the website and their functionality;
- Outline the required elements of your new website.
Examples: site/web search function, e-commerce, video functionality, blog features, social media integration, login/account capabilities;
- Detail any technological specifications for the project. Include specific programming language requirements, such as PHP or Javascript, and include your Content Management System requirements:

• Types of Content Management Systems

- **Open Sourced CMS:** A system used to manage the content of a website that is available to all for use, copy, edit, and redistribute. Wordpress is most common, representing 23.2% of all websites. However, Joomla and Drupal, with 3% and 1.9% of the website market share, also exist as open sourced content management systems;
- **Proprietary CMS:** A system used to manage the content of a website that is built on a code owned privately, so that only the owner of the code can maintain and distribute it. Proprietary CMS's typically fall into one of three categories: budget solution, low competition or vertical specific. Some proprietary CMS examples are Squarespace 0.5%, SimpleView, Weebly 0.4%, Blackbaud and Wix 0.3%:
 - Budget Solution/Low Competition: The budget solution or low competition business owner is looking for more of a billboard than a website;

- Vertical Specific: There are many design agencies which have aligned themselves with a particular industry vertical;
 - Built from scratch systems represent the other 62% of websites on the internet. These systems range from custom HTML-only websites built by high school students, to very complex systems built by financial giants;
 - Outline any page security certificates or encryption capabilities necessary, such as SSL, form validations, database security and protocols. Include email hosting requirements (client-based or local hosting);
 - Specify that you wish to own the website code.
- **Target Audiences**
- Provide a list of the target markets that will use your site including customer demographics and technology profiles, clients, sponsors, partners, investors, press and employees;
 - Give a description of how each of these audiences will use or interact with your website.

Check it out!



Users/Audience

(Give an overview of your audience, or the audience you wish to reach within your users. This will be available to an experienced agency to help tailor your project to meet your needs and the needs of your audience.)

- Your website demographics
- Your social demographics
- Who you want to be on your site and social
- Who is actually on your site and social

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Technological

- **Infrastructure Servers/Hosting**
 - Explain your current hosting environment;
 - Identify any changes you wish to make to your hosting services.
- **Third Party Sites**
 - List any external websites that need integrating into your new website and describe their purpose. Examples: e-commerce, reservation services, customer support ticketing, inventory, sales CRM etc.
- **Search Engine Optimization (SEO)**
 - Outline the level of SEO required within the scope of your website design.
- **Traffic Reporting**
 - Define any current analytics packages you have, describe any required changes necessary, and give new analytic tools that you would like to integrate into your new website.

Design

- **Style**
 - Provide a brief description of the look and feel you want to accomplish with your website design. Include some examples of websites that reflect your desired design and functionality;
 - Identify whether you wish to use your current logo and branding, or if you would like to update those elements as well.

Content

- **Explain** who will be responsible for content creation on the new site.

- **Identify** whether the copy will come directly from the old site, or if you will need new content;
 - Outline who will write the website copy if you need new content. Will you need the web design company to create it or will your company provide new content?
- **Specify** if the website design company is responsible for future content changes or if your company will implement the content changes.
- **Outline** where photos will be sourced, and whether you must purchase, edit or optimize the photos for web and mobile useage.

Check it out!

Style Guide (if available)

(If your company has a style guide, please provide that here, or ask for one as a deliverable.)

Proposal Guidelines/Requirements

(Provide your potential agencies with your guidelines and requirements for their proposals and submittals.)

- Reiterate your deadline

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Proposal Deliverables

- **Request for bidders to include the following in their proposals:**
 - Contact information (phone number, email address);
 - A summary of website development experience;

- A list of existing client references;
 - Their Project Plan, including phases for creation and implementation;
 - The estimated Project Budget;
 - Details about website design process - design, discovery, quality assurance testing, and implementation;
 - Details regarding your company's website project management structure;
 - Identify the project team members, including their relevant experience and credentials;
 - Any training options the bidder provides;
 - Contact information for clarification of the proposal, if needed.
- **Evaluation Criteria**
 - Identify evaluation criteria for the website design candidates.
Examples: pricing, meets requirements, experience, etc.
 - **Additional Information or Clarification**
 - Use this section to add any information you need to include, not listed in any other section.

Additional Considerations

- **Value added**
 - When considering agencies, keep in mind the value added;
 - Does this agency offer marketing solutions or SEO training with your website?
 - Will they work with you to improve your CTR or just focus on design?
 - These are things to be mindful of and open to, but you might have to pay for this level of expertise.
 - Make sure it's edited and polished.

Optional

- **ADA Compliance**
 - Describe what level of ADA compliance you require.
- **Conditions of Work**
 - Identify any governmental regulations or requirements. These may range from HIPAA compliance to PCI compliance, data encryption or SEC restrictions on data presented.
- **Functional Specification**
 - This is an optional document that gives specific instructions to developers for your website. This will go further in depth about the actual functionality of the site and the specifications. This document is best suited for large and/or resource heavy projects.

Glossary

API (Application Programming Interfaces)

A method that describes when a programmer writing an application program makes requests for (use of info from) a computer, operating system, or another application.

Browser

An application program that provides a way to look at and interact with all the information on the internet. Examples: Firefox, Google Chrome, Safari.

CMS (Content Management System)

A system used to manage the content of a website. A CMS allows the content manager or author, who may not know Hypertext Markup Language (HTML), to manage the creation, modification, and removal of content from a website without needing the expertise of a Webmaster.

Cross Browser Compatibility (Browser Agnostic)

The process of ensuring that a website is coded in such a way that it is displayed correctly across multiple browsers.

CSS (Cascading Style Sheet)

Code used to format the layout of Web pages by defining how to display HTML elements, such as headers and links. These style sheets can then be applied to any Web Page.

Encryption

Encryption is the process of encoding messages or information in such a way that only authorized parties can read it.

E-Commerce

The buying and selling of products and services by businesses and consumers through an electronic medium, without using any paper documents. E-commerce is subdivided into three categories: business to business or B2B (Cisco), business to consumer or B2C (Amazon), and consumer to consumer or C2C (eBay).

Framework (Web Development Framework)

A set of resources and tools for software developers to build and manage web applications, web services, and websites. A framework includes templating capabilities within a browser, the programming environment for scripting the flow of information, and the application programming interfaces (APIs) for accessing underlying data resources.

FTP (File Transfer Protocol)

An internet protocol that allows a computer to send files to or receive files from another computer. Like many Internet resources, FTP works by means of a client-server architecture; the user runs client software to connect to a server on the Internet.

Hosting/Hosting Service

Hosting is an arrangement in which a web host (often an internet service provider) maintains clients' websites on its computers and provides related services. These services may include leasing of hard disk space, maintenance of hardware and software, provision of backup and security, content integrity, credit card processing, email boxes and high-speed internet connection.

HTML (Hypertext Markup Language)

The set of markup symbols or codes inserted in a file intended for display on a World Wide Web browser page. This tells the Web browser how to display a Web page's words and images for the user.

ISP (Internet Service Provider)

An ISP is an organization that provides services and infrastructure for accessing the Internet. Those services may include Internet access, domain name registration, Web hosting, and more.

Permalink Structure

A permanent link (permalink) is a URL that always points to and directs readers to the same web page, blog post or any online digital media.

Platform

Any base of technologies on which other technologies or processes are built. An application can be a platform if it is a base for other programs.

Responsive (Web Design)

Formatting a website design so that the Website automatically adjusts itself most for the optimal for viewing and navigation across a wide range of devices, including traditional PCs, smartphones and tablet devices.

SEO (Search Engine Optimization)

Search Engine Optimization (SEO) is the process of affecting the visibility of a website or web page in a search engine's "natural" or un-paid ("organic") search results.

Sitemap

A list of pages of a website that are accessible to users. It can be either a document in any form used as a planning tool for web design, or a Web page that lists the pages on a website, typically organized in hierarchical fashion.

Theme

A template designed specifically for use to enhance the visual appearance and usability of a website. Many web development providers offer a selection of themes for their clients to choose from for their sites. Alternatively, predesigned blog themes can be found through a variety of websites, and many web designers offer custom themes for sites.

Template

A website template is a pre-designed web page, or set of web pages, that anyone can modify with their own content and images to set up a website.

UI (User Interface)

The junction between a user and a computer program. An interface commands or guides the way in which a user communicates with a program.

Wordpress

An example of a Content Management System.