# **Request for Information (RFI) – Advertising & Marketing Services**

*Instructions to Advertiser*:

Provide background to accompany the RFI that outlines as much information you can provide to guide the respondent. Be sure to clearly indicate who/where the RFI response should be sent, due date/decision timing, format, main point of contact(s), and desired length. It is recommended your cover letter include:

* What services are being requested (e.g. creative, media, social, experiential)
* What triggered the RFI (e.g., new product/brand, new strategy, current agency does not have the capabilities needed)
* Target audience (B2B, B2C)
* Key requirements you are looking for from the agency (e.g., specific experience, tools, size)
* Expected outcome/next steps (e.g., select 3-5 agencies for an RFP, understand various agency capabilities for future reference)
* Your confidentiality and “no press” policies, as well as your competitive conflict rules if applicable
* Budget/budget range if known
* Key deliverables if known

Review the following questions and customize as needed. Remember to keep the RFI succinct and use it as an informational gathering tool.

**RFI Template**

**Cover Letter**

*Instructions to Respondent*: Write a cover letter (no longer than two pages) to accompany your RFI, which introduces your organization. Consider addressing the following in your cover letter:

* 1. What differentiates your agency?
  2. Why are you the right agency for our organization? What is your value proposition?
  3. What is the work you’ve done that you are most proud of and why?
  4. What are your team’s specific strengths?
  5. What are your initial thoughts about this brand/advertiser?

**Credentials Request**

1. Agency Office Locations (if any) and Team Size

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Office location(s) (Indicate if Main Office or Satellite Office) | Street address | City, State,  Zip code | Number of total employees at this location (Senior leadership/ FTE/Freelance) | Percentage of remote employees |
|  |  |  |  |  |
|  |  |  |  |  |

1. Current Client List (25 Max.)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Company/Brand Name | Date of Engagement | Services Provided | % of current year Revenue (FEES) | Geography |
|  |  |  |  |  |
|  |  |  |  |  |

1. Former Client List (3 Max.)

|  |  |  |  |
| --- | --- | --- | --- |
| Company/Brand Name | Dates of Engagement | Services Provided | Geography |
|  |  |  |  |
|  |  |  |  |
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1. Background/History of the agency
2. Ownership details (including parent company, network affiliation, entities with any level of ownership in the agency, etc.)
3. Core capabilities:
   1. Describe relevant Centers of Excellence. Include date of origin, number of FTEs and KPIs for success.
4. Provide the percentage of FTE turnover over the last 12 and 24 months.
   1. What is the average turnover specific to account and project management teams over the last 12 to 24 months?
5. Based on the shared competitive conflict rules, identify if your organization has worked with any competitors in the past and the dates of service. If your organization currently works with competitors, we would like to understand the specifics of that relationship to determine if there is an actual conflict of interest.
6. List relevant awards/recognition that your organization has received in the last 12 and 24 months.
7. Share two or three relevant and recently published thought leadership pieces from your organization.
8. Case Studies: Please share two or three case studies of work done within the last three years where your firm supported a client with a similar challenge. Key points to include within each case study:
   1. **KPIs and Metrics:** Provide quantifiable results (e.g., engagement rates, conversion rates, audience reach, response time, sentiment analysis, brand recall/loyalty, and impact on brand reputation).
   2. **Target Audience Insight:** Explain the audience insights that informed the strategy.
   3. **Relevant Tech, Tools, and AI:** Describe the tech, tools and/or AI used in developing the solutions, if any.
   4. **Collaboration:** Detail any instances of working with other agencies to achieve campaign goals as well as the exact role each agency played.
9. For Media Assignments only:
   1. Provide media billings by channel each year for the last three years.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Linear TV | OOH | Audio | Print | Digital Video | Digital Display (Non-social) | Paid Social | Influencer | Search | Affiliate |
| Year 1 |  |  |  |  |  |  |  |  |  |  |
| Year 2 |  |  |  |  |  |  |  |  |  |  |
| Year 3 |  |  |  |  |  |  |  |  |  |  |

* 1. Provide details on identity graph services, data and analytic capabilities, and technology offerings.