



# How to Write a Great RFP

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Set your team up for success,  
save valuable time, and find the  
right strategic consultants to  
solve your next big challenge.



# RFPs Don't Have to be Painful.

Writing a Request For Proposal is no easy task. With no standard template and heaps of information to consider, the process can feel daunting and confusing. Challenges withstanding, it's important to get it right. **The quality of your RFP has a direct impact on the quality of your project's outcome – for better or for worse.**

After 15 years of reviewing thousands of RFPs from the world's biggest and most well-loved brands, we've documented the ideal formats, context, and information pieces that elicit solid proposals and ensure clear communication.

In the following pages, you'll find a detailed checklist and example template to help you create your next RFP. The prompts and formatting are intentionally designed to help you make "apples to apples" comparisons with insights partners, save time on feedback rounds, and ultimately, select the right partner and project design to meet your needs.



## About Kelton

**Kelton Global is an insights and strategy consultancy that helps global businesses grow and thrive.**

We combine research with creativity to help companies all over the world answer the question: what comes next? With a heritage in journalism, curiosity about the human experience is at the heart of everything we do.

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# BEFORE YOU WRITE: **THOUGHT STARTERS**



## **How much flexibility do you want to give the agency?**

Often, we see RFPs asking for methodological suggestions when the client already has specific elements in mind. The more up front you can be, the more likely agencies are to hit the nail on the head the first time around.

## **Are your goals realistic for your budget?**

We invest time and energy to use resources wisely, but the budget needs to fit the scope of the question. “Understanding the future of women’s style” isn’t a 2 week project with a \$50K investment. Consider doing some initial research on average costs to make sure you’re allocating enough budget, and be prepared to pay for good thinking.

## **Think more about end results than process.**

From the goals to the precise deliverables to implementation, think through what your expectations of the agency are for the end result – and consider letting them guide how you get there.

## **Consider co-scoping.**

If you already have an agency in mind, consider co-scoping the engagement so there’s absolute buy-in on both sides from the outset.

## **Dig deep to understand what’s been done before.**

In most organizations, insights aren’t centrally located in a repository. It can lead to studies – or parts of studies – being repeated, or projects starting broad when they could be more narrow. To get the most out of your budget, take a look around to see what exists before crafting your RFP.

## BEFORE YOU WRITE:

# TEAM CHECKLIST

This checklist contains a list of information you and your team might consider gathering or deciding on before you begin the RFP process, to save time.

- Company description
- Current business objectives for the fiscal year
- Objectives related to this specific project
- Previous insights work related to the current project
- Existing hypotheses about the challenge at hand, collected internally across departments where relevant
- Existing data sets that might be applied to the current project
- Contact information for key roles
- Predetermined measurement criteria for evaluating project partners
- Information and/or compliance parameters from your legal department that apply to the project that relate to the project
- Short list of agency/consultancy partners who will receive the RFP



# GETTING STARTED: SAMPLE RFP TEMPLATE

Before writing, take an hour to sit down with your team and review the contextual questions listed within the sample RFP below. Thinking through the prompts up front will save time on the actual RFP process. Providing this level of detail will yield better and more comprehensive proposals from potential service providers, so you can make an informed decision.

## PROJECT OVERVIEW

<b>Name of Project</b>	
<b>Brief Contextual Information</b> What circumstances prompted you to reach out to research providers with this need? Are you commissioning the project because things are going well, or because there's a problem?	
<b>Project Objectives</b> What do you hope to achieve with this work? If you have multiple objectives, consider organizing them by topic (for example: drivers, need states, path to purchase, etc.)	
<b>Business Objectives</b> What are the higher level business goals that project outcomes should tie to?	
<b>Anticipated Geographic Scope</b>	
<b>Populations of Interest</b> Including information about geographic scope and specific populations will help providers to deliver accurate pricing in their first proposal, limiting revisions.	
<b>Methodologies of Interest</b> While it's a good idea to remain open to different approaches for tackling a challenge, list any methodologies that are a requirement here.	

**PROJECT OVERVIEW**  
*Continued*

<b>Budget</b> Providing a range is usually best.	
<b>Desired Project Timeline</b> Consider if there are any specific meetings or internal deadlines that might affect project timing.	

**KEY TEAM MEMBER CONTACT INFORMATION**

First / Last Name	Role	Business Email	Phone Number

## PROJECT SPECS + CONSIDERATION CRITERIA

### Project Design Guardrails

If you have a preference for how you would like potential partners to structure their proposals, include that information here.

### Mandatory Project Phases

If you have any project phases that you consider to be mandatory, list them here.

### Desired Deliverable Format(s)

Consider what types of deliverables you might expect to receive at the close of your project. Think about the different audiences that will use the work. How do they best receive information?

### Measurement Criteria

What benchmarks will you use to determine which partners best meet your needs?

### Provider Information

What types of contextual information do you expect to see from the research providers in order to make your evaluations? (Team bios, client references, case studies, etc.)

### Experience Level with Insights

How familiar is your organization with research and strategic consulting work? This may affect the structure and content of proposals.

### Potential Roadblocks

Are there any operational factors that should be taken into consideration for the work to be properly engrained in the business?

### Legal Considerations

Are there any pertinent legal terms or parameters that the firm you work with needs to comply with?

## CONTEXTUAL + HISTORICAL INFORMATION

### Company Summary

Include mission/vision/positioning statements if relevant. If you are a part of a larger business, it may be a good idea to mention which business areas are in or out of scope in relation to this project.

### Company's Stated Value Propositions

Are you trying to leverage or emphasize a particular set of competitive advantages that might influence this project work?

### Existing Category Insights

Do you have any existing information about your category that might be helpful in informing the project?

### Your Customer

Does your team use specific criteria to define your company's customer base? Are there specific subgroups that are particularly important?

### Existing Research / Relevant Data

Have you conducted any previous research, or do you have access to existing data, that might be helpful for the project? If so, share some details here.

### Direct Competitors

Is there anything potential partners should know about competitors that might be relevant to the project?

### Existing Hypotheses

Do you have any existing hypotheses about the question or objective that this work will help to solve? Share here.



## We LOVE talking about this stuff.

Want to learn more about how Kelton can help your business with strategic insights, or need help co-scoping an RFP?

**Give us a call or drop us a note.**

**+1.310.479.4040 | [contact@keltonglobal.com](mailto:contact@keltonglobal.com)**



**[CLICK HERE](#) to download an editable version of our RFP template!**