

How to

Write a Website Redesign RFP that Will Attract the Best Agencies



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01

Why It Pays to Get This Right

The *best agencies* are looking
for the *best clients*.



Entice them with a stellar RFP
and make magic together.

You've been tasked with one of the most significant undertakings for your company: redesigning its website. Beyond acting as the chief marketing vehicle for your brand, the website impacts nearly every internal department and its success could even catalyze your own career growth.

So not surprisingly, kicking off your company's website redesign can feel like you're at the base of Mt. Kilimanjaro, and looking up, you can only see the first hundred feet before the fog obscures your view. With so many factors to consider—the stakeholders involved, user experience (UX) best practices, fragmented audiences—it can be difficult to know what your first step should be.

But as with any great challenge in life, a reliable partner makes a world of difference. You should look for agencies steeped in brand communications and web expertise as your trusted sherpa up the mountain. And your request for proposal (RFP) to redesign your website is more than simply a tool to solicit potential candidates—it's your opportunity to attract the agencies *you* most want to work with; the ones who will exceed your expectations and deliver career-changing results. The way in which you craft your RFP indicates to agencies what it will be like to work with you and your brand, the unique challenges they can help solve and the level of trust you're likely to place in them.

CHAPTER

02

Prepping Your RFP

Assess your situation

It may seem obvious, but this first step is too often overlooked: why are you redesigning your site? Consider this question across the multiple internal and external stakeholders who use your site.

Questions to ask yourself

- Do you have evidence of a clunky UX or dated interface?
- Are engagement metrics declining?
- Does your site no longer adequately tell your brand story?
- Are you introducing a new business unit that is forcing an evaluation of the entire portfolio?

Why this matters

This step helps to uncover the scale of work and type of partner needed to address the underlying challenges. If you nail down your *why*, you can right-size your *how*.

TIP If your company is rolling out a new brand identity and creative platform but your website otherwise functions well, you might be able to achieve your goal through new **HOME** and **ABOUT** pages, with a CSS refresh, instead of a full site overhaul, saving you time and money.

Assess your objectives

Write down a list of the specific goals you have for the site and organize them into three categories:

Umbrella-level objectives

What does success look like at the highest level for your site?

Examples include:

- Enhance visitors' perception of the brand
- More clearly articulate the company's value proposition
- Reduce call center volume through intuitive content organization

Site-section objectives

What specific goals do you want to achieve within particular portions of your site? Examples include:

- Increase landing page engagement
- Double conversion rate on downloadable content
- Reduce cart abandonment by 15%

Features and functionality objectives

What specific tools and functionality are you looking to create, fix or overhaul? Examples include:

- Simplify web lead records within the database
- Create a marketing automation platform
- Connect the dots between online tools

Why this matters

Clearly defining your objectives upfront enables you to gain alignment with your internal stakeholders and new agency partner, and provides you with shared criteria with which to evaluate success.

TIP Website redesigns can be lengthy. As time goes on, internal teams and supervisors often change their minds on various site objectives. A shared objectives list helps to keep wanderers on track, while giving you the ammo needed to request additional budget, should any party decide to change course midway through the project.

Calibrate your expectations (and your budget)

Website redesigns are among the trickiest projects marketing and IT teams can undertake because of the sheer number of stakeholders and front-and-back-end considerations involved. There will be bumps along the way, costs you weren't expecting and political infighting. It's important that you mentally steel yourself and your team for these challenges, and look for a partner who will help you prepare for and navigate the unknowns.

Questions to ask yourself

- How long (and with what budget) does your team think this project will take? What do you suspect is the reality?
- Has anyone on your website project team been through a redesign before? If so, what challenges have they encountered that you should prepare for?

Why this matters

A successful website redesign is part mental exercise—if the organization has unrealistic expectations from the start, the project is set up for frustration and possibly failure. Avoid this by preparing for hardship and look for an honest and transparent partner agency.

TIP Please don't call your agency a vendor (even though it's technically true). The best partnerships are just that: partnerships. Treat your agency as an extension of your team, and you'll see dividends.

CHAPTER

03

Elements of a Website Redesign RFP

Now it's time to translate your situation into a killer web RFP—one that effectively conveys the exciting task at hand and indicates the type of client you'll be. Organize your thoughts into these categories, offering clear and concise information throughout. And remember: you don't need to have all the answers right now; that's why you're on the hunt for an amazing partner.

- 1 State the assignment and situation
- 2 Project objectives and measuring success
- 3 Audiences
- 4 Considerations

1

Assignment and situation

- Identify upfront what work this RFP addresses and who it is written for.
- Offer background information about your organization and your unique value proposition to the market.

2

Project objectives and success measurement

- Outline your umbrella-level, site-section features and functionality objectives.
- Include specific key performance indicators (KPIs) that your organization will use to determine success of a redesign, such as lead capture volume, conversion rate improvement and tool engagement metrics.

3

Audiences

- List out all known stakeholder groups this website needs to address, what these groups look to get out of an interaction with your website and what a successful website session looks like from your company's perspective.
- Include target audiences you aspire to speak to.
- Include any known information blindspots—things you'd like to learn about certain user groups to inform this work, as agencies often can bring fresh research to shed light on these unknowns.

4

Considerations

Brand

Describe how the website plays a role in your overall brand communications strategy. For instance, if you are a healthcare IT brand that focuses on translating statistics to qualitative human outcomes, what impact can your website have on conveying that positioning? If you're a challenger brand, how can your UX and user interface (UI) reinforce that ethos?

Content, features and functionality

- Give the reader a sense of size/scale of your site—how many pages does it have now? How many do you envision it having over this redesign and why?
- To what degree will you be changing your site's content (e.g., imagery, copy, graphics, etc.)? Who is currently responsible for producing that content? What about in the future?

TIP Look for partners that care about your overall cost of ownership, not just what it will cost to do this project right now. For instance, if you need to publish a good quantity of content, how much are they focusing on making that easy for you and doable for your in-house team?

- What new functionality and features would you like on your site? Proactively organize this into a prioritized wishlist. This will help agencies respond with the appropriate costs, as what may seem like a simple feature to add may cost a lot more than your budget allows.

Technical

Consult with your IT team to flesh out the list of back-end considerations for your site. Organize these into two categories:

- **Current-state technical situation**

What systems are in place now (e.g., content management system, APIs, databases, automation, etc.)?

- **Ideal future-state technical situation**

What systems do you hope to have in place as a result of a redesign? What are your requirements (e.g., usability standards, responsive design, etc.)? Some companies have a clear vision here and others look to partners for their input.

TIP You can always ask agencies to sign a non-disclosure agreement (NDA) prior to issuing an RFP that contains confidential information.

Governance

How do you intend to run the website project? What do you suspect your team's approval process to look like? How many people will need to be involved and at what stage? How much time do you typically need to review new work and provide feedback? Answers here will help sharpen agency responses in timelines and fees.

CHAPTER

04

Getting the Best Response: Thoughts on Format

Be as clear as possible with what you would like in a response to your RFP that will help you select the right partner. However, be careful not to be overly strict—allow agencies some creative flexibility in their response. The best agencies want to woo you, so setting tight restrictions on response length or format can hamper creative thinking.

Here is a recommended framework for a response:

Agency interest and differentiation

- Ask for a brief explanation as to why they're interested in this particular project with your organization. And, what makes their offering unique—why should you consider them above the alternatives?

Relevant prior experience

- Ask for case studies that demonstrate the agency has successfully managed projects of your size/scale/complexity before, including a demonstration of tangible impact on performance.

Agency and team structure

- Ask who will be on your web redesign team and their role in the process. Request that you meet this team during the pitch, as evaluating personnel and culture fit cannot be overlooked.
- Ask how their agency is structured and what services they intend to provide. For instance, do they separate account managers from project managers and strategy? How much work do they outsource vs. directly manage in the agency?

Approach/methodology and services

How does the agency intend to approach the project?

TIP Agencies that take the time to immerse themselves in your business through a discovery process is a good sign. A true partner can deliver an effective new website only *after* understanding the mechanics of your business. So look out for business immersion and discovery work as part of their process.

Pricing and timing

- Web redesign projects are difficult to estimate both in terms of cost and timing at the outset. Some agencies may offer very specific pricing, but without taking the time to truly evaluate the needs, it's difficult to say exactly what the all-in costs will be. That said, the more specific you are with your RFP, the more specific you can expect the pricing estimates to be.
- Instead of asking for exact pricing, request a ballpark estimate of project cost by phase of work, paired with their methodology.
- It also helps to proactively offer a budget and goal launch date, if possible. This guides agencies on the likelihood of achieving your desired outcomes with the reality of the resources it will take to get there.
- Offer a date by which agencies can submit questions. These can be written questions, but ideally would be best handled through a conference or video call. This lets you get to know the respondents on a personal level and allows you to begin to gauge their proficiency.

What could go wrong?

Ask them to indicate the primary challenges they've encountered during website redesigns of this size and type. What roadblocks have they run into? And what is their strategy for mitigating those common challenges?

As you receive responses to your RFP, be open to new or different approaches to website redesigns, and seek to understand why agencies choose certain methods over others. This will not only bolster your own understanding, but will also provide an idea of who you'll be as a potential future client.

The Karma Agency is a strategic communications and digital marketing services firm, headquartered in Philadelphia, PA. We help companies of all sizes evaluate and optimize their digital footprint, with a particular focus on website redesigns. We'd love to hear from you and read your RFP.

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