



# RFP SAMPLE & TEMPLATE

Analytics Services



# RFP TEMPLATE

## Analytics Services

### Template Background and Description:

This template is redacted from an RFP we received from an organization looking for an analytics partner. In addition to being simple and straightforward, the organization used the RFP to provide a clear definition of success and gather insights on how potential partners think about success.



## I. OVERVIEW & PROJECT GOALS

In this section, explain why your organization exists and identify the specific analytics issue you're looking to solve. If possible, include what a “win” would look like for your team.

### For example...

*A “win” for you would be to answer some of the questions you are asking internally—such as:*

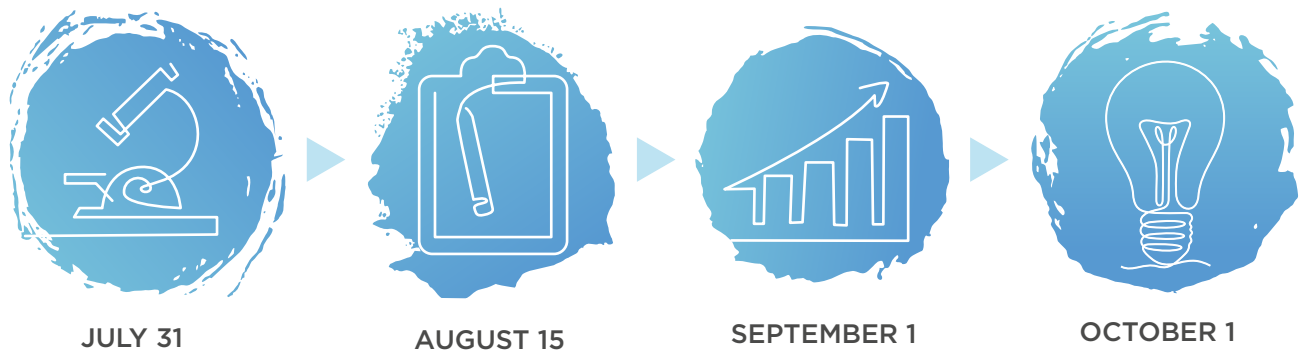
- *Understand the emotional connection donors have to the brand*
- *Understand the personal significance of our brand to constituents and donors*
- *What content do our supporters use and want*
- *Why and how viewers and supporters came to know about our organization*
- *How (and with whom) do they engage our content*
- *How (and with whom) do they talk about us*
- *Identify obstacles with the current consumer experience*
- *Identify improvements required on our various platforms*



## II. SCOPE OF SERVICES & TIMELINE

In this section, you want to be clear about the specific scope of services you're looking to fulfill and identify the timeline you need to meet.

**For example...**



MILESTONES	TIMING	DELIVERABLES
Research & Development	Week 1—2	<ul style="list-style-type: none"><li>• <i>Kickoff Meeting</i></li><li>• <i>Objectives</i></li><li>• <i>Success Criteria</i></li><li>• <i>Industry Landscape</i></li></ul>
Strategy	Week 3—4	<ul style="list-style-type: none"><li>• <i>Sample Size</i></li><li>• <i>Research Methodology</i></li><li>• <i>Survey QA</i></li></ul>
Survey Deployment & Data	Week 7—8	<ul style="list-style-type: none"><li>• <i>Send Survey</i></li><li>• <i>Assess Response</i></li><li>• <i>Uncover Themes</i></li></ul>
Insights & Personas	Week 9+	<ul style="list-style-type: none"><li>• <i>Research Report</i></li><li>• <i>Next Steps</i></li></ul>



### III. ABOUT YOUR COMPANY

In this section, you want to assess whether or not a respondent is the right “fit” and discover how passionate and curious they are to help your organization learn and grow.

#### For example...

- *Your “Why”*
- *Key Differentiators*
- *Client Success Stories*
- *Case Studies*
- *Current Systems and Platforms*
- *Project Team and Roles*
- *What Success Looks Like for You and Your Clients*

### IV. NEXT STEPS

In this section, you want to provide details on how and when respondents should submit their RFP and set an expectation for immediate next steps after submission.

## WANT TO USE THIS CONTENT IN YOUR NEXT RFP?

WE HOPE THIS ANALYTICS TEMPLATE PROVIDED SOME NEW  
AND HELPFUL IDEAS TO HELP YOU FIND THE RIGHT PARTNER.

---

If you'd like to utilize this framework or content in your  
next RFP, you can email Whitney Norman, Director of  
Client Solutions, at [whitney.norman@pursuant.com](mailto:whitney.norman@pursuant.com)  
for a free templated version of this sample.