Sample Mobile Design and Development Request for Proposal (RFP) Template

OkelaniDigital

Welcome

Starting a new project is an exciting time. It signifies a fresh start and is often a representation of the culmination of different goals and initiatives from key stakeholders within a company. Prior to a project beginning, however, there is a detailed process of gathering desired outcomes from stakeholders, submitting project requirements to potential vendors, reviewing their proposals, and deciding upon the right partner. This is known as the RFP process.

In an effort to help assist organizations with this process, Okelani Digital is providing this RFP Template that focuses on the information organizations should provide and request when seeking a digital partner.

How to Use the Template

This template should be used by organizations seeking digital partners for their mobile design and / or development services. The following sections will be broken out into two parts:

- What information should you provide to potential partners in order to obtain the most comprehensive proposal?
- What questions you should be asking potential partners to best understand their methodologies and core values?

Each section to follow will have text in *yellow italics* that should be filled out by the organization seeking the digital partner (you). This is your cue to enter in the applicable information to start building your RFP.

Table of Contents

- Title Page & Project Overview
- Project Strategy & Purpose
- Response Requirements
- RFP Structure & Transparency
- Appendices

Title Page & Project Overview

The first step of forming your RFP is to create the title page and a project overview.

Client Logo

Company Name
Request for Proposal
Title of Request

Project Overview

Provide potential partners with a short overview of your vision, desired outcome(s), and specifics around the type of project (e.g. native iOS app, responsive web, Voice assistant).

Project Strategy & Purpose

In this section, provide potential partners with sufficient context to propose real and complete solutions by responding to the questions below. This section will be primarily filled out by you, and the following sections are primarily instructions to potential partners

Background

Summary of Business
- *How long have you been in business? Is there institutional history that is relevant to this RFP?*
- *What are your primary capabilities and mission?*

Stakeholders & Decision Makers
- *Who is leading the project? Who will be involved in selecting a vendor?*
- *What other stakeholders will be involved in the project?*

Project Overview

Summary of Business Problem
- *What core business problem is the mobile or digital solution designed to address?*
- *What are the Key Performance Indicators (KPIs)?*
- *What was the origin of the project, and how has it evolved? Have you been working with a digital partner already? What has their role been on the project?*
- *What would success look like for this project, both from a quantitative perspective (e.g., financial) and qualitative perspective (e.g., supporting a certain brand image)? What are the potential costs of failure (e.g., delivering a poorly designed or performing app, or missing timelines)?*

Scope
- *Is this a mobile- or digital-only solution, or part of a larger project that includes non- digital components?*
- *Does this product establish a new line of business or enhance an existing one?*
- *What components are not included in the scope?*

Systems

Users
- *What are your customer demographics? Who are your repeat users? What customer groups would you like to see grow?*
- *Do you have personas, journey maps, or other user research you can provide the Responder? If so, what methodologies were used?*

Features
- *What analysis/ranking of features has been conducted? What methodologies were used?*

Market Overview
- *What other solutions are in the market that appeal to you? What are their strengths and weaknesses? Are there non-competing but analogous experiences that inspire the solution?*
- *What current style guides or examples of apps/websites are indicative of your design direction? What specific attributes do you like/dislike?*

Platforms
- *Which devices and Operating Systems will be supported? What drove those selections? If developing a mobile app, will the app(s) be native?*

Architecture / Integration
- *How will the overall system be architected?*
- *What backend systems/data sources will the app be interfacing with? Do these systems currently exist?*
- *If these systems exist, are you able to provide documentation/diagrams describing the system or access for Responders to review the application programming interfaces (APIs) as part of the RFP process?*
  - *If not, what is the timeline/process for building them? Will the Responders be asked to assist in the architecture and/or development of APIs?*
  - *What third party integrations will be required for this project?*

Prototypes
- *Have any prototypes been developed to-date? Can you share them with Responders?*

Marketing / Distribution
- *How will this product be promoted and distributed to end users?*
- *What will drive engagement and ongoing repeat usage?*

Schedule
Target Timeline & Drivers
- *What is the target launch date, and what drives that date as the target (e.g. a certain event)?*
- *What deliverables will be required? What other interim milestones are part of this request?*

Response Requirements
Mobile or Digital Agency Background & Capabilities

This section includes instructions to potential partners to ensure you find an agency who will help solve business problems creatively, deliver intuitive and delightful designs, and develop a fast, stable mobile experience, within timelines/budgets. Consider revising, adding, or removing questions in this section to tailor them to your request. For example, if the project does not include design, you might remove the Design Capabilities section.

Please provide a description of your organization's background and capabilities as follows:

Background

- Please provide your legal business name, website, address, number of employees, parent company (if applicable), and office locations. Do you have any overseas or contract/freelance employees?

Summary/History
- How did the agency start? Who is the executive team, and what is their background? What is the mission of the agency?

Differentiators
- How does the company differentiate itself vs. competitors?

Portfolio
- Please summarize several relevant mobile projects (e.g., similar industry, level of complexity, design considerations) and the problems you were trying to solve. Provide a link to each if publicly available.

Awards
- Please summarize your top awards or other examples of thought leadership in product strategy, design, or development.

HR & Hiring Processes

Please provide highlights of your work culture and any ratings/awards in this area. Please summarize your hiring process.

Partnerships

- What partnerships do you maintain that are relevant to this request?

- **Mobile Design & Technology Assessments:**
  - Please give a short summary of several mobile strategy projects and/or assessments you have done in the past and the outcome.

  - *[Include if this project includes a current app/mobile site that will be updated as part of this project or if you plan to include initial wireframes or designs for review]* Please perform a design and code assessment and make several significant suggestions for design and development improvement.

  - *[Include if mobile solutions will tie into existing back-end systems]* Please review the following *[APIs, Feeds, Data Sources, etc.]* and explain whether you can use them as-is to deliver the desired mobile functionality or if you would suggest changes.

Design Capabilities

- Describe your design team. Please include sample resumes or bios, including at least one of whom would be assigned to our project if it were to start today (we understand that individuals may or may not be available when the contract is executed).

- Please summarize your design process for a typical design engagement. Describe your design team's feedback processes, for both internal and client feedback cycles. How does your design team validate design decisions?

- Describe your design team's process for designing accessible and ADA compliant experiences.

Development Capabilities

- Describe your software development lifecycle.

- Describe your development and QA team, including the number of employees working on each platform, full-time/part-time, and at each location. Please include sample resumes or bios, including at least one of whom would be assigned to our project if it were to start today (we understand that individuals may or may not be available when the contract is executed).

- *[If the Agency will be asked to assist in integrating, modifying, or building back-end systems]* What backend capabilities do you have? What languages/frameworks do you use? Please describe one or more similar engagements, including the problem and the solution you were able to deliver.

- How do you manage/ensure best-in-class technical documentation?

- Summarize a typical QA process. Describe your automation and manual testing strategy

Security / Intellectual Property

- What approaches and tools do you use to ensure security of your products?

- How do you manage the use of open source or other libraries that could compromise the IP of the final product?

- Does your standard development process include the use of company owned proprietary IP (e.g. a platform, library, or SDK) to aid or expedite development? How is the IP used? How is it licensed to clients?

Architecture/Integration:

- What would you propose for system architecture?
- What content management system (CMS) would you use?
- Can your agency support third party integration?

Project Management:
- Describe your project management team. Please include sample resumes or bios, including at least one of whom would be assigned to our project if it were to start today (we understand that individuals may or may not be available when the contract is executed).
- Please describe your project management philosophy/approach.
- How does your PM team deal with large complex organizations and differences of opinion within those organizations?

References

- Please provide several references of similar projects.

Project Proposal

- **Project Concept & Recommendations**
    - What are your major recommendations for our app? Are you proposing a native or hybrid approach?

- **Project Approach**
    - Please summarize your approach to the project, and what you believe will be major variables/risks that will drive success/failure based on our goals. What will drive consumer adoption and use? How can those risks best be managed on our side and your side?

- **Communication**
    - How will we interface with your team on a day-to-day basis? What tools will be used?

- **Project Team Summary**
    - Describe the team that will complete this work.

- **Timeline/Budgets:**
    - Please propose a timeline for project completion.
    - Please propose a budget based on your proposed timeline/staffing.
    - Please include an approach to ongoing maintenance and support.

- **Measurement, Analytics and Ongoing App Improvement and Management**
    - What measurement/analytics would you propose? Together, how will we use analytics/reviews/etc. to drive continuous improvement?

RFP Structure & Transparency

When you release your RFP to potential partners you will want to convey structure and transparency expectations. This will help potential partners not only frame their responses in a more tailored fashion but also create a more bespoke solution from day 1.

- **Format for Response**
  - *Insert information about your preferred format for the response (e.g., submission method, file type)*

- **Budget:**
  - *Describe the expected budget for the project. Being open about budget ranges will significantly improve the responses you will receive. By leaving the budget open, you run the risk of receiving a wide range of responses and possible project solutions, and being left without a true a basis for making apples-to-apples comparisons.*

  - *Provide any instructions for the format of Responder cost estimates (e.g., costs you'd like itemized) and contract type (e.g., time and materials vs fixed price).*

- **Evaluation Criteria**
  - *How will the you choose whom to work with? What will be the criteria and how will they be ranked?*

- **Timeline:** The schedule for RFP submissions is as follows:
  - Initial RFP Distribution: *Insert Date*
  - Responder Submission of Questions: *Insert Date*
  - Question Replies (or QA session if applicable): *Insert Date*
  - Final Submissions: *Insert Date*

- **Points of Contact**
  - *Insert contact information for the primary point of contact from your organization about the RFP.*

Appendices

Insert any materials referenced mentioned above that will assist Responders (e.g., code, diagrams, templates for response).