

• FREE TEMPLATE · 2026 EDITION

# Agency RFP Template

A ready-to-send RFP with built-in scoring rubric for enterprise marketing teams evaluating agency partners.

TRUSTED BY ENTERPRISE MARKETING TEAMS AT

Activision · ASUS · SoftwareOne · Booyah Advertising · Nasdaq

**1000+**

DATA CONNECTORS

**90 hrs**

SAVED / WEEK

**99.9%**

DATA ACCURACY

**~5 min**

READ TIME

# Fill-in-the-Blank RFP

Complete each section and send to prospective agencies.

## 1 Company Overview

COMPANY NAME & INDUSTRY

ANNUAL MARKETING BUDGET

PRIMARY AUDIENCE SEGMENTS

## 3 KPIs & Success Metrics

PRIMARY KPIS (TOP 3)

CURRENT BASELINES

## 5 Timeline

RFP RESPONSE DEADLINE

DESIRED ENGAGEMENT START

## 7 Technical Requirements

MARTECH STACK COMPATIBILITY

DATA SECURITY / COMPLIANCE

## 2 Project Scope

CHANNELS & TACTICS REQUIRED

GEOGRAPHIC MARKETS

SCOPE EXCLUSIONS

## 4 Budget Range

ANNUAL RETAINER RANGE

FEE STRUCTURE PREFERENCE

## 6 Reporting Expectations

REPORTING CADENCE & FORMAT

DASHBOARD / BI TOOL ACCESS

## 8 Submission Guidelines

REQUIRED DELIVERABLES

CONTACT FOR QUESTIONS

# Agency Evaluation Matrix

Rate each agency from 1 (weak) to 5 (exceptional). Multiply by weight to get weighted scores. The highest total wins the shortlist.

CRITERION	WEIGHT	AGENCY A	AGENCY B	AGENCY C	WEIGHTED
<b>Strategy &amp; Insights</b> — Market research, audience strategy, competitive analysis	20%	__ / 5	__ / 5	__ / 5	—
<b>Creative Excellence</b> — Portfolio quality, brand alignment, innovation	15%	__ / 5	__ / 5	__ / 5	—
<b>Media Capabilities</b> — Channel expertise, buying power, programmatic	15%	__ / 5	__ / 5	__ / 5	—
<b>Analytics &amp; Measurement</b> — Attribution, dashboards, data infrastructure	15%	__ / 5	__ / 5	__ / 5	—
<b>Technology &amp; Tools</b> — Martech stack, proprietary tech, integrations	10%	__ / 5	__ / 5	__ / 5	—
<b>Team &amp; Talent</b> — Senior leadership, team stability, relevant experience	10%	__ / 5	__ / 5	__ / 5	—
<b>Pricing &amp; Value</b> — Transparency, competitiveness, ROI potential	10%	__ / 5	__ / 5	__ / 5	—
<b>References &amp; Case Studies</b> — Industry relevance, verified results, client tenure	5%	__ / 5	__ / 5	__ / 5	—
<b>TOTAL</b>	<b>100%</b>	—	—	—	—

**SCORING:** 5=Exceptional • 4=Strong • 3=Meets req. • 2=Below avg. • 1=Weak

# Chemistry Meeting Questions

Use these 15 questions across 3 categories during finalist presentations. Add the Reference Check Script for due diligence calls.

## A. Strategic Fit

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1. What is your process for building a media strategy from scratch vs. optimizing an existing one?
  2. Walk us through a campaign where initial results underperformed. How did you pivot?
  3. How do you stay ahead of platform algorithm changes and emerging channels?
  4. What does your competitive intelligence process look like for our vertical?
  5. How would you approach measuring incrementality beyond last-click attribution?
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## C. Cultural Fit

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11. How would you describe your agency culture in three words?
  12. Tell us about a client relationship that did not work out. What did you learn?
  13. How do you balance data-driven recommendations with creative intuition?
  14. What does proactive communication look like at your agency?
  15. Why is our brand an exciting challenge for your team?
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## B. Operational Fit

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6. Who would be on our day-to-day team, and what is their tenure at the agency?
  7. What does your onboarding process look like in the first 30/60/90 days?
  8. How do you handle scope creep and out-of-scope requests?
  9. What reporting cadence and tools do you use? Can we access raw data?
  10. Describe your escalation path when campaigns miss targets two months in a row.
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## Reference Check Script

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- R1. On a scale of 1-10, how likely are you to rehire this agency? Why?
  - R2. What was the biggest challenge during the engagement, and how did they handle it?
  - R3. How responsive were they when something went wrong?
  - R4. Did the senior people in the pitch actually work on your account?
  - R5. If you could change one thing about working with them, what would it be?
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# Get Unified Reporting Across All Your Agencies

Improvado consolidates data from 1000+ marketing platforms into a single source of truth -- so you can evaluate agency performance with clarity, not spreadsheets.

[Book a Demo](#)

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