

# The Ultimate Demand Gen RFP



Hello Marketers – I thought I would write you all this quick note explaining what this RFP is and why we made it. At least a few times a year I have someone ask me if we had a sample RFP they can use to select a good digital marketing firm. So we invented a fictitious company (Eupraxia AI) and issued this sample this RFP template in their name. It's truly all the questions we would ask an agency if we were hiring them and sets the bar high enough to ensure you only get the best. It is truly The Ultimate Demand Gen RFP!

Use this RFP's questions to formulate your RFP and our sample benchmark response and score card to compare the responses you get back. And of course, please include us in your RFP!

Enjoy and happy marketing!  
Harry J. Gold  
CEO, Overdrive Interactive

## ULTIMATE DEMAND GEN RFP RESPONSE

Why apply to get the sample RFP response?

- See how Overdrive would respond to this RFP
- See if other agencies can rise to level of our sample response

RFP Response includes:

- Word doc version of the Ultimate Demand Gen RFP
- Agency profile and specifications
- Sample tech buyer personas
- Sample MarTech audits
- Sample end to end customer journeys
- Sample Demand Gen and ABM media plans and campaigns
- Sample nurture campaigns
- Sample ROI dashboards
- Sample keyword lists and SEO reports
- **Agency score card**



**REGISTER NOW**

REQUEST FOR PROPOSAL (RFP)

# Eupraxia AI Demand Generation Program



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# 1. RFP Overview

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Eupraxia AI, the leading AI-powered auditing & financial risk assessment platform, is seeking proposals from digital agencies to take our demand generation programs to the next level. Our goal is to generate leads and increase demand from our target accounts and current client base. Success is measured by the volume of quality leads generated within a fixed budget, as well as the percentage of such that convert to MQLs and sales pipeline. While our primary focus is the US, this global program also reaches into the LATAM, EMEA, and APJ regions.

We currently anticipate our annual budget could be between \$4 and \$6 million dollars depending on the full scope of services the agency can provide, geographies covered and campaign performance as the year progresses.

As our strategically aligned partner and digital agency of record, your firm must have deep expertise and inhouse capabilities in ABM, Lead Generation, SEO, Media Planning and Management, SEM, Creative Services, Web Development, Content Marketing, MarTech Ops and Integration, as well as a strong analytics and reporting practice.

We want our digital marketing efforts to:

- Clearly articulate our positioning and value proposition to the market, build awareness, and promote thought leadership.
- Drive qualified leads from target companies into the sales funnel.
- Foster engagement and sales escalation throughout the customer journey.
- Close the loop on tracking, reporting, and analytics to drive measurable results and increased ROI on media spend.

The ideal agency will also deliver expert strategic direction based on years of experience marketing to enterprise technology buyers.

**Overdrive Guidance:**

*Provide context for the RFP with a very brief overview about your company and core offerings.*

*Give a general sense of your needs, objectives, budget ranges, and the desired agency relationship you seek.*



## 2. Company Overview

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Eupraxia AI was founded in 2010 with a mission dramatically streamline the time and expense required to identify risk and dramatically reduce fraud in the financial services sector, in the most secure ways possible. Headquartered in Burlington, MA, the company is an industry leader, with over 3,200 employees located in 12 countries.

Our flagship offering, Eupraxia AI Vigilance, helps financial services companies identify and manage complex market, regulatory, and operational risk. AI Vigilance examines entire data sets, probing and assessing all transactions and monetary flows in real time and retro-actively.

AI Vigilance gives compliance and information security teams complete visibility and real time response to a wide range of threats and transactions. Our platform analyzes complex transactions, datasets and compliance rules in real time, matching them to compliant reactions and preventative responses.

With AI Vigilance fraudulent and non-complaint transactions are detected across the global enterprise and blocked before they can be completed.

Highly scalable and intuitive to use, our platform operates in a highly secure environment and integrates across transactional platforms. It is a trusted resource of leading banks and financial institutions around the globe. Our clients cost-efficiently maintain compliance standards and protect their brands, while simultaneously reducing the threat of fraud and loss.

**Overdrive Guidance:**

*Spend 3-5 paragraphs explaining a little about your company culture, purpose, value proposition, and/or core offerings.*

*Provide links to some reference materials if you like but resist the temptation to elaborate beyond the example shown at left.*

*A smart agency team will do their own research to complement what you've outlined.*



### 3. Campaign Budgets

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Our annual, (12 month) demand generation budget covers all regions, product lines, and campaigns, and includes media, creative, and agency fees. It will cover the following:

- Steady state managed media: \$2.4 to \$3.6 million
  - SEM and display retargeting across all product lines including landing page and display ad creative.
  - ABM, Display, Retargeting, Social, Video, Nurture Email, Content development, etc.
- Earned media: \$320,000 to \$500,000
  - SEO, social, inbound

**Overdrive Guidance:**

*Summarize key details of your intended budget, such as regions covered, offerings being promoted, desired tactics, and marketing mix.*

### 4. Selection Criteria

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The ideal agency must be able to demonstrate core competencies in all aspects of B2B digital marketing, demand generation, and account-based marketing (ABM), complete with case studies and references. It must also have well thought-out and repeatable digital marketing processes with training programs that our various divisions can embrace. Ultimately, we want to unify our digital approach across our enterprise.

Inhouse skills and platforms that are absolutely required include a strong strategy and project management account team; conversion optimization and paid search managed by Google Certified media managers; online media planning and buying services managed by a DoubleClick Digital Marketing (DDM) certified media team; enterprise class technical consulting and content development led by a BrightEdge Certified Professional SEO team; super-strong dashboarding and data analytics capabilities; strong MarTech and marketing ops team; and a conversion-oriented creative team that can craft entire customer journeys from the first ad impression to the last email before a deal is struck.

The agency team must absolutely demonstrate an ability to give strategic guidance based on their insights from analytics, as well as be able to apply best practices on the tactical level.

**Overdrive Guidance:**

*Paint the vision for your ideal agency. What are the must-have skills, platform proficiencies, credentials, and overall approaches that you want in your agency team?*

*At this early stage in the RFP, you've provided agencies with everything they need to quickly decide whether they're qualified to respond.*

*This will save you time looking through unqualified submissions, allowing you to focus only on the best and most appropriate proposals.*





## 5. RFP Schedule/Timing

Below deadlines are 5:00pm ET unless otherwise noted.

Eupraxia issues RFP via email .....	__/__/__
Agency confirms participation via email .....	__/__/__
Agency questions about RFP submitted and addressed .....	__/__/__
Written RFP is due .....	__/__/__
Eupraxia issues Assignment to a shortlist of no more than 3 agencies .....	__/__/__
Assignment Q&A calls completed .....	__/__/__
Shortlisted agency Assignment presentations start week .....	__/__/__
Shortlisted agency Assignment presentations completed .....	__/__/__
References due .....	__/__/__
Final agency selection and contract finalized .....	__/__/__
Onboarding, client/agency program kick-off .....	__/__/__

### Overdrive Guidance:

*Give agencies no more than 2 weeks to complete the RFP, and no more than another 2 to 3 weeks to complete the Assignment.*

*Here's why: While 4 to 5 weeks is not an eternity, it's enough time to get quality work and the best thinking from a good agency. A month is fair to both parties. Great client / agency relationships are based on how well your agency team can think and operate as a team, how well they assess problems and provide actionable solutions in real time, and how well they connect with you and your marketing staff.*





## 6. Agency Strategy and Approach Questions

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### 6A. AGENCY OVERVIEW

Please give us a brief overview (no more than 2 pages) covering your agency background, and describing your philosophy, core services, areas of expertise, relevant clients, and what makes you a top digital demand gen agency.

In your response, please elaborate on what distinguishes you from other agencies, relevant to this RFP.

**Overdrive Guidance:**

*Use this section to gain a little context around each candidate agency. Encourage them to keep it brief and remind them that they will be submitting their capabilities deck as well presenting in the finalist rounds. Let them freestyle a little.*

### 6B. THE TEAM

Help us understand how your departments are structured and the degree to which they are staffed.

**Part 1:** Please provide a standard org chart of your agency.

**Part 2:** Please include short bios of the type of enterprise-level demand gen team we can expect to work on our account. (Please indicate which staff members are freelancers or from partner organizations.)

**Overdrive Guidance:**

*Guard against selecting an agency team that will be spread too thin – one search person is not enough. In contrast to web development or design firms trying to do demand generation, the core DNA of digital marketing agency should be media and demand generation. It should have a strong roster of highly skilled, Google certified staff and analytics driven media managers.*



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## 6C. ACCOUNT AND PROJECT MANAGEMENT APPROACH

**Part 1:** Please describe the team’s account management approach, including how you develop strategy, manage projects, and drive results. In your response, please outline how you approach your clients MarTech stack. Please elaborate on your account team’s experience dealing with CRM and Marketing automation systems such as Salesforce and Pardot, as well as dashboarding tools such as Data Studio, SiSense, or Tableau.

**Part 2:** Please also be sure to provide a sample project schedule for an integrated demand generation campaign, as well as a sample status sheet we can expect to be going over in our weekly status calls.

### Overdrive Guidance:

*Get a clear idea of how the agency manages its projects and how established their processes are. This is critical as your average enterprise level campaign has dozens of details that must be proactively managed every day. How much experience do they have toggling together the MarTech monster and media cloud! Do they have an actual system and experience or are they winging it?*

## 6D. DEMAND GENERATION/ABM APPROACH AND CAPABILITIES

**Part 1:** Briefly explain your approach to demand generation planning and program management. In your response, please address how you make all the components work together and manage the myriad details?

**Part 2:** Please describe your approach and experience with ABM (account-based marketing) and how it integrates with demand generation.

### Overdrive Guidance:

*Questions like these will help surface agencies that can articulate their experience coordinating the myriad media, creative, content, reporting, and technology elements of a typical enterprise marketing program into a successful sales funnel. They should also be able to differentiate between Demand Gen and ABM.*



## 6E. CUSTOMER JOURNEY MAPPING AND OPTIMIZATION

Please outline how you create, integrate, and optimize the customer journey to improve customer experience (CX) and ROI?

## 6F. RELEVANT CASE STUDIES

Please provide between 3 to 5 one-page case studies from B2B technology clients to showcase past performance in meeting digital growth goals. In each case study, include KPIs and success metrics, with examples of creative and content, as appropriate.

**Overdrive Guidance:** *This is where you'll learn which candidate agencies have true B2B demand generation experience. Look for responses that close the loop and show measurable improvements on real metrics like conversion rates, cost per lead, cost per MQL (marketing qualified lead) and end of funnel true ROI.*

### **Overdrive Guidance:**

*This question challenges agencies to show how they coordinate and optimize their marketing elements into a smooth customer experience and sales funnel. It also gives them an opportunity to account for touch points to integrate with and influence, but not control such as Salesforce and Pardot. They should also mention CRO (conversion rate optimization) and the journey resulting lead data takes through the MarTech stack.*

## 6G. STANDARD CREDENTIALS MATERIALS AND REPORTS

**Part 1:** Please provide us with your standard credentials/capabilities deck as well as links to any case studies or videos from your site or social platforms you think would be relevant

**Part 2:** Please provide us with the following Sample Reports:

- Integrated media dashboard
- Paid search report (SEM)
- Competitive SEO/Keyword Ranking Report



## 7. Required Tactical Capabilities Questions

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### AGENCY SERVICES

**Part 1:** Please check which of the following tactical services are a standard part of your offering:

- ☐ Brand Development
- ☐ Content Strategy and Development
- ☐ Conversion Optimization
- ☐ Data and CRM Analysis
- ☐ Design and Creative
- ☐ Email Nurture/Drip Campaign Development
- ☐ MarTech/Salesforce Consulting
- ☐ Paid Media Planning, Buying and Management
- ☐ Search Engine Marketing (Paid Search)
- ☐ Search Engine Optimization (SEO)
- ☐ Social Media Marketing
- ☐ Strategic Consulting and Account Management
- ☐ Tracking, Reporting, Analysis, and Optimization
- ☐ Video Production
- ☐ Web and Application Development
- ☐ Other Capabilities (please list)

#### Overdrive Guidance:

*This section is where the rubber hits the road and you figure out what each participating agency can really do. It lists the critical digital skills and agency must possess to run integrated demand generation programs. Fragmented agencies can launch fragmented programs if they rely too much on coordinating outside resources.*

**Part 2:** Service Details - for each of the items checked, please address the following items if applicable in a succinct, one-page response that includes the following:

- How each service is staffed (in-house teams, vendors, freelancers)
- How you measure success
- Relevant certifications, partnerships, and technologies used



## 8. Agency Qualifications and Requirements

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### 8A. AGENCY AGE, STAFFING, SIZE, LOCATIONS

- Please state the number of years the agency has been in business.  
(We require a minimum of 5.)
- Please list the number of full-time employees and their departments  
(We require an agency of at least 40 full time individuals.)
- Where is your headquarters and other locations?  
(Our team is spread out globally, but we would prefer Boston Area or at least US and Eastern Time Zone.)

### 8B. AGENCY FINANCIALS AND AVERAGE CLIENT SIZE

How many clients do you have in total?

Please list the total annual billings of your top 10 clients (without disclosing names) so we can see where we would rank.

Client 1: \_\_\_\_\_  
Client 2: \_\_\_\_\_  
Client 3: \_\_\_\_\_  
Client 4: \_\_\_\_\_  
Client 5: \_\_\_\_\_  
Client 6: \_\_\_\_\_  
Client 7: \_\_\_\_\_  
Client 8: \_\_\_\_\_  
Client 9: \_\_\_\_\_  
Client 10: \_\_\_\_\_

**Overdrive Guidance:**

*Get an idea of the average size of accounts the agency handles and where you rank against the agency's other clients. Do you want to be a big fish in a small pond, or will you be a small fish in a big pond? Whether you have a smaller or medium-sized budget, you want to see a roster of clients that match your size and scale. Asking in this way is a polite and minimally invasive way to ask some financial questions in the Phase 1 round of an RFP.*



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## 8C. TEAM TRAINING

Please provide us with a sense of your approach to staying abreast of the latest changes and developments in digital marketing.

In your response, please address the following:

- Your approach to keeping our teams informed of industry developments and innovations.
- If you have LMS-ready training sessions or curriculum you share with your clients?

### Overdrive Guidance:

*Select an agency that trains its staff and its clients to work from the same playbook. Both agency and client teams should be following the same systems, methodologies, and best practices.*

## 8D. PLATFORMS, PARTNERSHIPS AND CERTIFICATIONS

Candidate firms must also be able to understand MarTech integration and work with our internal CRM / marketing automation ops team to launch nurture campaigns, score leads, and develop dashboards and reports.

Please expand upon the sample list below the Media and MarTech Platforms your agency uses on a regular basis. (Please highlight those platforms for which you have certifications.)

Sample list of Media and MarTech Platforms

- Google Ads, Bings Ads Certified
- Demandbase (or any similar ABM platform)
- Social (Facebook & LinkedIn) Certifications
- SEO platform certifications

### Overdrive Guidance:

*This is where you get a sense of how capable an agency is in providing technical support that keeps campaigns running and performing well. Look for responses that cover the full customer journey – from SEO certifications, like BrightEdge, ad serving platforms like Google Ads and DoubleClick, and web analytics platforms like Adobe, Omniture, and Google Analytics, for example.*



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## 8E. DATA PRIVACY AND AGENCY SECURITY DOCUMENTATION

What are your information security protocols covering the storage, access, and transportation of personal information? In your response, please describe how you adhere to the following laws, as applicable:

- California Consumer Privacy Act (CCPA).
- General Data Protection Regulation (GDPR)
- Health Insurance Portability and Accountability Act (HIPAA)
- Health Information Technology for Economic and Clinical Health Act (HITECH)
- Canada's anti-spam legislation (CASL)
- Personal Information Protection and Electronic Documents Act (PIPEDA)
- Generation Data Protection Regulation (GDPR)

## 8F. INSURANCES

Please provide certificates of insurance for the following:

- Professional Liability (We require up to \$5 Million)
- Personal Business Property (We require up to \$200,000)
- Business Owner Liability (We require up to \$4,000,000)
- Cyber Liability (We require up to \$5 Million)
- Workers Comp (We require up to \$1 Million)

## 8G. COMPETITIVE ISSUES AND INDUSTRY EXPERIENCE

**Part 1:** Is your agency currently engaged with any of the following direct competitors? If so, how would you structure your staffing to ensure no overlap of team resources?

[company name 1], [company name 2], [company name 3]

**Part 2:** Do you have any clients (or client experience) who are marketing products in the following areas?

- Artificial intelligence
- Business process automation
- Cyber security
- Regulatory compliance

### Overdrive Guidance:

*Highlight any potential conflicts of interest or competitive issues that could prevent hiring a candidate agency. You can also probe for client experience with competitive/comparative products.*





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## 8H. REFERENCES AND TESTIMONIALS

Please provide up to three client references, featuring the following information:

- Full name, title
- Company name, URL
- Email address
- Phone number
- Services delivered

### Overdrive Guidance:

*There's no need to check references of all participants. But you do want them on hand for finalists and it's good to see that they can provide them.*

## 9. Pricing Questions

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### 9A. PLEASE DESCRIBE HOW YOU CHARGE FOR THE FOLLOWING ITEMS:

- Media and SEM
- Creative and Production
- Consulting
- SEO and Social Media Management
- Markup on materials and tech platforms

### 9B. BUDGET

Please provide a sample detailed integrated demand generation budget for the following ranges: \$2 Million, \$3 Million, and \$6 Million

### 9C. EXCLUDED ITEMS

What types of demand generation deliverables and services are typically not included in your budgets or fully handled by your agency?

### Overdrive Guidance:

*Agency pricing models can get complicated, but they should never be a mysterious black box. A comprehensive marketing plan should be visualized as a simple budget worksheet detailing everything provided by the agency.*

*You don't want to hear "Our budget doesn't include that!" for something you need done right before launch. Now is the time to identify the gap between what you need vs what the agency provides.*



## 10. Agency Assignment (For Selected Agencies Only)

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### CAMPAIGN AND PRODUCT DESCRIPTION:

This assignment for the launch of our new workflow-integrated product Eupraxia AI Vigilance, our newly integrated AI powered auditing and compliance platform. It audits entire data sets of data instantly and monitors transactions in the business process workflow in real time so our customers can head off issues off at the pass before they happen. Eupraxia AI Vigilance gives customers complete compliance visibility into any type of data object or transaction at a macro or granular level with the security of instant issue alerts and automatic interventions.

What is exciting about this launch is that we have integrated new features from recent acquisitions into a single platform that allows AI powered security and compliance audits of existing data and real time monitoring of new transactions. It is this union that enables two step compliance verification required by many financial regulations.

Our primary decisionmaker is the Chief Information Security Officer (CISO) and Chief Compliance Officer (CCO) at financial services companies with greater than 300 employees in the US and Canada.

### Target Audience:

Decision-makers are Chief Information Security Officers (CISO) and Chief Compliance Officers (CCO) in the US and Canada, as well as select international cities including London, Hong Kong and Tokyo, working at firms of over 300 employees, in the following financial sectors:

- Banking
- Insurance
- Payment processing
- Investment management firms
- Mortgage brokers and servicing companies

### Overdrive Guidance:

*Use 2-5 paragraphs here to provide context for the assignment. Briefly highlight the product or service that will be the focus of the assignment. Describe the target audience and outline why they choose your brand over others. Doing so will give the agency useful insight on how to formulate benefit statements, content ideas, offers language, and target keywords for completing the assignment.*



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Our customers love Eupraxia.ai Vigilance because it:

- Radically reduces hours spent on compliance reviews and correcting errors by staff across the enterprise.
- Improves customer service with smoother transactions that passes through compliance and underwriting with fewer mistakes and delays.
- Instantly identifies, intervenes, and escalates issues to mitigate legal issues, customer service issues, and possible brand reputation issues.
- Is highly intuitive and easy to set up across departments and functions for rapid AI skills development and business process automation.
- Has low setup and monthly costs, which are instantly paid through increased workplace efficiency and productivity
- Helps firms comply with key industry regulations such as:
  - The Sarbanes-Oxley Act (SOX)
  - Gramm-Leach-Bliley Act (GLBA)
  - Payment Card Industry Data Security Standard (PCI DSS)
  - FFIEC Guidelines covering the following, for example:
    - ◊ Business continuity planning, development, and acquisition
    - ◊ Electronic banking
    - ◊ Information security
    - ◊ I.T. audits
    - ◊ I.T. management
    - ◊ Outsourcing technology services
    - ◊ Retail payment systems
    - ◊ Supervision of technology service providers
    - ◊ Wholesale payment systems



## CAMPAIGN BUDGET PARAMETERS:

- Steady-state managed media: \$2.4 to \$3.6 million
  - SEM and display retargeting across all product lines including landing page and display ad creative.
  - 6-8 Targeted ABM display and video campaigns: \$1.4 to \$2.2 million
  - ABM, display, retargeting, social, video, nurture email, content development, etc.
- Earned media: \$320,000 to \$500,000
  - SEO, social, inbound
  - Organic Social Media (posting and moderation on LinkedIn, SlideShare, Twitter, Facebook, and YouTube.)

### Overdrive Guidance:

*Giving clear budget guidance helps agencies to present realistic ideas and forces them to be creative and pragmatic. You don't want risky or outlandish pie in the sky awareness ideas if your goal is to open sustainable and reliable lead channels that consistently feed your sales funnel. You should be looking for dollars to be focused into things that have a demonstrable track record of driving positive ROI.*

## CAMPAIGN GOALS AND SUCCESS METRICS

Our objectives for this engagement will include driving targeted brand awareness, website traffic, top-of-funnel leads, and Marketing Qualified Leads for our sales pipeline.

Our goal is to scale significantly. We seek an agency that can help us drive toward the following goals in the next fiscal year:

REGION	NET NEW LOGOS	EXPANSION WITH EXISTING LOGOS	TOTAL BOOKED REVENUE
GLOBAL TOTALS	\$14,735,000	\$6,406,522	\$21,141,522
NA	\$9,250,000	\$4,021,739	\$13,271,739
EMEA	\$3,322,500	\$1,444,565	\$4,767,065
APJ	\$1,475,000	\$641,304	\$ 2,116,304
LATAM	\$687,500	\$298,913	\$986,413

### Overdrive Guidance:

*Sharing your target revenue and/or performance goals puts the agency relationship in the right context – aligned with generating revenue and ROI.*



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## PRESENTATION DETAILS

You will have 90 minutes for presentation and discussion. Please highlight your assumptions. We can discuss during the call. Be prepared to explain your reasoning and methodologies for each of the following areas and what you envision what our ideal customer journey could/should be:

- Integrated Demand Generation/ABM Campaign Approach
- Staffing/Team
- Target Personas
- Content Ideas
- Sample Campaign Creative
- ABM/Demand Gen Media
- Paid Search
- Paid Social
- SEO Approach
- Sample Integrated Campaign Dashboard
- Sample Schedule
- Proposed Budget Ranges (crawl, walk, run) Based on the parameters above, please provide 12-month budget levels (low, medium and high) for the following required elements:
  - Strategy Consulting, Planning and Program Management
  - Content Strategy and Development
  - Campaign Creative
  - ABM/Demand Gen Media Planning and Management
  - Integrated campaign dashboard development
  - Paid Search Marketing (SEM)
  - Paid Social Media
  - Search Engine Optimization (SEO)
  - If provided by your firm, please provide sample pricing and budgets for the following optional services not included in the budget above:
    - ◊ Web Development/Marketing Ops Support (Salesforce/Pardot admin and landing page development)
    - ◊ Organic Social Media (posting and moderation on LinkedIn, SlideShare, Twitter, Facebook, and YouTube.)

### Overdrive Guidance:

*Giving clear budget guidance helps agencies to present realistic ideas and forces them to be creative and pragmatic. You don't want risky or outlandish pie in the sky awareness ideas if your goal is to open sustainable and reliable lead channels that consistently feed your sales funnel. You should be looking for dollars to be focused into things that have a demonstrable track record of driving positive ROI.*



**REGISTER NOW**

#### Four Reasons to Talk to Overdrive:

1. Get an expert opinion on how to achieve your marketing goals
2. See real-world case studies showing how others succeed with digital-1st marketing
3. Get a realistic look at the costs and elements of a customized program
4. Gain access to the completed version of this RFP

#### USEFUL LINKS



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