

REQUEST FOR PROPOSAL · TEMPLATE

B2B Performance Marketing Agency RFP

Use this template to define your requirements, compare agencies consistently, and select a partner capable of producing measurable pipeline and revenue, not simply marketing activity.

HOW TO USE THIS TEMPLATE

- ▶ Click any purple [bracketed field] and type your organization's information.
- ▶ Tick the boxes that apply. Mark any sections that do not apply as N/A.
- ▶ How to share: When you're done, save the PDF, or print to PDF from page 2 onward to leave out this instruction page.

B2B Performance Marketing Agency RFP

RFP Overview

Issuing organization
Issued date
RFP owner
Proposal deadline
Anticipated budget
Target start date
Initial engagement term

SECTION 01

Company and Opportunity

Introduce your organization, products or services, business model, target markets, and current stage of growth.

Explain the opportunity you want the selected agency to help address and what a successful partnership should make possible.

Company overview

Opportunity

SECTION 02

Why Now?

Explain why your organization is evaluating agencies at this time.

Include the business conditions, performance challenges, internal changes, growth objectives, or market opportunities that are driving the search.

Reason for initiating the RFP

Primary business outcome

SECTION 03

Target Audience and Buying Journey

Describe the target customers the agency will be expected to reach. Include:

- Target industries and company characteristics
- Buyer, influencer, and decision-maker roles
- Priority products, solutions, or segments
- Average contract or customer value
- Typical sales-cycle length
- Important stages in the buying journey
- Geographic markets and languages
- Known audience or market-development challenges

Your response

SECTION 04

Geographic Requirements

Identify the regions the agency must support. Select all that apply:

North America	Latin America
United Kingdom and Ireland	Europe, the Middle East, and Africa
Asia-Pacific	Other: _____

Describe any requirements related to regional strategy, local market knowledge, language, time-zone coverage, campaign localization, reporting, or coordination across markets.

SECTION 05

Scope of Services

Required Services

Select the services that must be included:

Paid search	Paid social
Programmatic advertising	Search engine optimization
Generative engine optimization	Content strategy and production
Performance creative	Conversion-rate optimization
Revenue operations	Analytics and attribution
Other: _____	

Explain the expected responsibilities, deliverables, and level of strategic or execution support required for each selected service.

Optional Services

Identify services that may be added later or proposed as optional components.

Out of Scope

Identify the work that will remain with your internal team or another partner.

SECTION 06

Performance Objectives

Define the business results the engagement should produce. Whenever possible, connect marketing performance to qualified pipeline and revenue.

OBJECTIVE	METRIC	CURRENT BASELINE	TARGET	TARGET DATE
Primary business				
metric				
e.g. qualified pipeline, closed-won revenue, CAC, return on marketing investment				

OBJECTIVE	METRIC	CURRENT BASELINE	TARGET	TARGET DATE
Funnel-quality metric e.g. sales-qualified opportunities, lead-to-opportunity conversion, pipeline velocity, avg. opportunity value				
Efficiency metric e.g. cost per SQL, cost per opportunity, customer acquisition cost, ROAS				

SECTION 07

Current Marketing Performance

Provide enough clear performance data for agencies to develop more informed recommendations. Include:

- Current media spending and channel allocation
- Recent campaign and funnel performance
- Lead, opportunity, pipeline, and revenue quality
- Customer acquisition costs
- Attribution methodology
- Organic and paid visibility
- Current agency or partner relationships
- Previous approaches and key lessons
- Known performance or measurement gaps

SECTION 08

Technology, Data, and Measurement

List the systems currently used for each area below.

AREA	CURRENT PLATFORM(S)	NOTES
Customer relationship management		
Marketing automation		
Web analytics		
Advertising		
Attribution and reporting		
Business intelligence		
Content management		
Sales engagement		
Consent and data governance		

Describe any known limitations involving tracking, integrations, attribution, data quality, platform access, or reporting.

Agencies should explain:

- How they connect channel activity to pipeline and revenue
- How they unify data across platforms
- Whether they use proprietary technology or intelligence tools
- How their technology improves planning, optimization, forecasting, or reporting
- What access, implementation work, or additional fees their technology requires
- Who owns and can export the resulting data

SECTION 09

Agency Requirements

Proposals should demonstrate the agency's capabilities in the following areas.

B2B Performance Marketing Expertise

Provide examples of work with organizations that have complex products, long sales cycles, multiple buyer roles, or high-value transactions.

Explain how your approach differs from a typical B2C or lead-volume-focused program.

Revenue Accountability

Explain how your team connects marketing activity to sales-qualified pipeline and closed revenue.

Identify the metrics you optimize, how you assess lead quality, and how budget decisions are tied to business outcomes.

Regional Delivery

Describe your ability to plan and execute across the regions identified in this RFP.

Include team locations, time-zone coverage, regional expertise, localization capabilities, and the process for maintaining global consistency.

Technology and Intelligence

Describe any proprietary technology, internal data, automation, or AI capabilities used to improve client performance.

Include specific examples of how these capabilities influence strategy, execution, optimization, forecasting, or reporting.

Integrated Execution

Explain how your specialists collaborate across paid media, content, SEO, creative, programmatic, revenue operations, and analytics.

Describe how you prevent channels from operating as disconnected programs.

Team Structure

Identify the proposed account team, including:

- Names and roles
- Relevant experience
- Location and time-zone coverage
- Expected level of senior involvement
- Responsibilities
- Estimated allocation to the account
- Use of contractors or external partners

SECTION 10

Required Proposal Content

Organize the proposal using the following structure. Agencies can tick each item as a completeness check before submitting.

#	PROPOSAL SECTION	INCLUDED
01	Executive summary	
02	Understanding of our business and opportunity	
03	Recommended strategy and rationale	
04	Proposed scope, services, and deliverables	
05	Measurement and revenue-accountability framework	
06	Technology and data approach	
07	Regional delivery model	
08	First 30-, 60-, and 90-day plan	
09	Proposed team and operating model	
10	Relevant case studies and references	
11	Implementation timeline	
12	Pricing and commercial terms	

#	PROPOSAL SECTION	INCLUDED
13	Assumptions, dependencies, and risks	
14	Optional recommendations or services	

SECTION 11

Transition and First 90 Days

Agencies should provide a practical transition plan covering:

- Account, platform, and data access
- Measurement and tracking validation
- Existing campaign and content audits
- Immediate performance risks
- Early optimization opportunities
- Strategy development
- Stakeholder alignment
- Reporting setup
- Key deliverables and decision points
- Expected client participation

The response should distinguish between immediate actions, foundational work, and longer-term opportunities.

PHASE	FOCUS	KEY DELIVERABLES
Days 1–30		
	Immediate actions	
Days 31–60		
	Foundational work	
Days 61–90		
	Longer-term opportunities	

SECTION 12

Budget and Pricing

Provide the available budget or anticipated range.

COST CATEGORY	ANTICIPATED RANGE
Agency fees	
Media spending	
Creative or production	
Technology	
Other costs	
Total	

Agencies should separate recurring fees, one-time costs, media spending, production costs, technology fees, and optional services.

They should also explain how the engagement and budget could scale as performance improves or additional regions and services are introduced.

SECTION 13

Constraints and Dependencies

Describe any requirements involving the areas below. Tick those that apply:

Brand standards	Legal or regulatory compliance
Data security and privacy	Procurement
Geographic limitations	Technology platforms
Accessibility	Internal approvals
Resource availability	Critical deadlines

SECTION 14

Evaluation Criteria

Proposals will be evaluated according to the following criteria. Weights are optional; if used, they should total 100%.

CRITERION	WHAT WE'RE ASSESSING	WEIGHT
Strategic understanding	How well does the agency understand our business model, audience, buying journey, and growth opportunity?	
Relevant B2B experience	Has the agency produced measurable results for organizations with comparable customers, sales cycles, and growth challenges?	
Revenue accountability	Can the agency connect its work to qualified pipeline, acquisition efficiency, and closed revenue?	
Regional capabilities	Can the agency provide consistent, coordinated support across our required markets?	
Technology and data capabilities	Does the agency use technology and data to produce clearer insights, faster optimization, and stronger business outcomes?	
Integrated capabilities	Can the agency coordinate strategy and execution across the required disciplines?	
Team quality	Does the proposed team have the experience, availability, and senior support required?	
Transition plan	Is the proposed onboarding and first 90-day plan practical, specific, and aligned with our priorities?	
Commercial value	Does the proposed investment represent strong value relative to the scope, capabilities, and expected results?	
Total		100%

SECTION 15

Submission Instructions

Submit the completed proposal by _____ to _____.

Direct questions to _____ by _____.

Shortlisted agencies will be invited to _____ during _____.

Key dates

MILESTONE	DATE
RFP issued	
Questions due	
Answers shared with all agencies	
Proposals due	
Shortlist presentations	
Selection decision	
Engagement start	