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## **Ecommerce RFP Template**

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## **Thank you for downloading our Ecommerce RFP Template**



Creating a detailed and easy to understand RFP is imperative for any prospective agency you are approaching to build a new website. Over our 10 years of building commerce sites we have received RFP’s in all formats and sizes. We always find the more detailed a brief is, the better and more accurate our response can be. 

So, we decided to create this free template to serve as a starting point for any commerce retailers who are looking to create their own RFP which they want to send out for quotations.

Although the template covers a lot, every commerce site is different and some of the sections may or may not apply to your online store, and for that reason the template is completely free to be customised.



We will continue to improve the template over time and if you have any feedback for us or would like help putting together an RFP, let us know by dropping an email to hello@fluidcommerce.co.uk.

Kind Regards, 

**Fluid Commerce**

1st Floor, 18 Hilton Street, Manchester, M1 1FR

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# **YOUR COMPANY NAME**

## **RFP Document Name**

### Created: DD/MM/YYYY

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| --- |
| Company Information |
| Company Name | *Your company name* |
| Company Address | *Your company address* |
| Company Number | *Your company registration number* |
| Brief Company Background | *Detail a background of the company* |
| Brief why this project is needed | *Include any targets and goals. Problems/key issues faced by your current solution.* |

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| RFP Response Information*Provide information on when you would like RFP response in by, who they should go to and your decision making process.* |
| Respond to Name | *Who should receive this RFP response* |
| Respond to Email | *Who should receive this RFP response* |
| Respond to Phone | *Who should receive this RFP response* |
| Supporting Documents | *Include a link or name of any supporting documents which should accommodate this document. Brand Assets, Technical Diagrams etc.* |
| Respond by Deadline | *Provide a deadline for when you need all responses in by* |
| RFP’s to be shortlisted by | *Let agencies know when you will be shortlisting agencies for the next stage and what the next stage entails.* |
| RFP Decision to be decided by | *Let agencies know when you are planning on choosing a partner* |
| Key Stakeholder(s) | *Include the names and positions for any key stakeholders in the project. (Stuart Hill - Finance Director)* |
| Ideal Project Go Live Date | *Provide the ideal launch date for the project and explain why this target date is important to you.* |
| Risks | *Do you have any other projects, product launches, internal systems which are being worked on which could impact this project or launch date?*  |
| Budget | *What is your budget goal post? Save yourself time, be upfront about your budget so the agency knows you are only entertaining budgets within specific boundaries.* *Be specific with budget. Is your budget for the design and build of the website only or do you have separate budgets for add-ons, licence fees, hosting etc. Break it down.*  |

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| Current Website Information*This helps the agency understand how busy the site is, how much data is held and what level of hosting support is required.* |
| Current Ecommerce Platform | *Include version if applicable* |
| URL(s) | *Existing website URL* |
| Current Hosting Provider | *Who is the current website hosted by?* |
| When Was the Site Built? | *When was the website originally built?* |
| Regions Covered | *Do you sell only in the UK or other countries as well?* |
| Yearly Online Revenue | *What is the yearly revenue of the website?*  |
| Orders per Day on Average | *How many orders per day does the website do?* |
| Average Order Value | *What is the average order value of the website?* |
| Any Seasonality & When? | *Are there any seasonality trends on the site and when is your peak period? What percentage does traffic increase during peak?* |
| Number of SKUs | *How many active and inactive SKU’s do you currently have? Is this likely to increase significantly during or shortly after the project?* |
| Number of Customers | *How many customers do you currently have on the website?* |
| Product Types | * *Simple*
* *Configurable*
* *Bundle*
* *Grouped*
* *Virtual Gift Card*
* *Physical Gift Card*
 |

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| Third Party Agencies*It’s good for any prospecting agency to understand other parties who will be involved in the site build.* |
| Are there any third parties involved? | * *SEO Agency*
* *PR Agency*
* *Marketing Agency*

*Please add their contact details.* |

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| Frontend Functionality*Detail common elements, functionality and pages you expect the users to see and use on the website frontend. More importantly, detail any functionality which people may not find on other websites.* |
| Global Website Header | *Detail the elements and functional elements you need on this part of the website:** *Logo*
* *Basket Icon*
* *Mini Cart*
* *Search Bar*
* *Menu*
* *Main navigation*
* *USP Bar*
* *Notice Bar*
* *Login/Register*
* *Breadcrumbs*
 |
| Global Website Footer | *Detail the elements and functional elements you need on this part of the website:** *Additional Menu*
* *CMS Page Links*
* *Newsletter Signup*
* *Social Icons*
* *Accepted payment method icons*
* *Contact information*
 |
| Homepage | *Detail the elements and functional elements you need on this part of the website:** *Main Image*
* *Category Blocks*
* *Featured Categories*
* *Featured Products*
* *Content Blocks*
* *Social Feed*
* *Reviews Feed*
 |
| Top-Level Category Page | *Detail the elements and functional elements you need on this part of the website:** *Category Title*
* *Category Content Blocks*
* *Sub-Category Blocks*
 |
| Category Page | *Detail the elements and functional elements you need on this part of the website:** *Category Title*
* *Category Description*
* *Category Image*
* *Sort By*
	+ *Price (high - low)*
	+ *Price (low - high)*
	+ *Latest*
	+ *Best Sellers*
* *Filters*
	+ *Price*
	+ *Sub-Categories*
	+ *Colour*
	+ *etc.*
* *Product Image*
* *Product Name*
* *Product Price / Sale Price*
* *Pagination*
 |
| Product Page | *Detail the elements and functional elements you need on this part of the website:** *Product Types*
	+ *Simple*
	+ *Configurable*
	+ *Grouped*
	+ *Bundle*
	+ *Gift Card*
* *Product Name*
* *Product Price*
	+ *Sale Price*
* *Product Images*
	+ *Product Zoom*
* *Product Videos*
* *Product Descriptions*
* *Delivery information*
* *Returns information*
* *Product Specific Reviews*
* *Product Technical Detail (Attributes)*
* *Related Products, Up-sells, cross-sells*
 |
| Basket Page | *Detail the elements and functional elements you need on this part of the website:** *Line items for products added to basket*
	+ *Name*
	+ *Image*
	+ *Price*
	+ *Qty*
	+ *Price*
* *Order summary*
	+ *Costs breakdown*
* *Apply discount code*
* *Apply gift cards*
* *Cross-sells*
 |
| Checkout Page | *Detail the elements and functional elements you need on this part of the website:** *Shipping Page 1*
	+ *Email / Login*
	+ *Shipping Address details*
	+ *Shipping methods*
* *Billing Page 2*
	+ *Discount Code*
	+ *Apply Gift Card*
	+ *Payment Methods*
	+ *Order Summary*
 |
| Order Confirmation page | *Detail the elements and functional elements you need on this part of the website:** *Order Summary Details*
 |
| CMS Page | *Detail the elements and functional elements you need on this part of the website:** *Header*
* *Content*
 |
| Login / Create Account Page | *Detail the elements and functional elements you need on this part of the website:** *Login Fields*
* *Name and address fields for account creation*
 |
| Account Dashboard | *Detail the elements and functional elements you need on this part of the website:** *Personal Details*
* *Previous Order History*
* *Wish List*
* *Address Book Management*
* *Gift Card Management*
* *Newsletter Subscription Control*
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| Internationalisation*If you are selling in other countries, detail as much information as possible about how the site acts differently for overseas customers.* |
| Tax Settings | *Detail how your tax settings differ for each country.* |
| Delivery Methods | *How do your delivery methods change per country?* |
| Payment Methods | *Do you want to offer different payment methods?* |
| Currency Conversion | *Do you control the exchange rate or is it calculated in real time using a third party?* |
| Translation | *Do you need the website to be converted into other languages?* |
| Product restrictions  | *Do you sell your full product catalogue in other countries or is there restrictions on the items you sell?* |

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| Backend (Admin) Functionality*Thinking about the team who merchandises the website, runs reports and manages customer orders. Is there functionality they specifically require?* |
| Customer Management | *Detail any custom admin only functionality you would like to have over customers.* |
| Order Management | *Detail any custom admin only functionality you would like to have over customer orders.* |
| Reporting | *Detail any custom reporting requirements you may need.* |
| Merchandising | *Ability to control positioning of products as they appear on category pages* |

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| B2B Functionality*Include any functionality specific to your B2B customers and how you manage those customer accounts.* |
| Company Accounts | *The ability to create multiple sub-accounts associated to a company and control permissions based on user roles.*  |
| Company Credit | *Provide companies with a credit limit so they can Pay On Account* |
| Quick Order | *For those who know the product name or SKU of the products they want to order. Lists of SKU’s can be imported into the quick order form.*  |
| Requisition List | *Allow users to save time when purchasing frequently-ordered products by creating a requisition list they can easily add products to the basket from.* |
| Shared Catalog | *Provide exclusive catalogs to certain customers* |
| Custom Pricing | *Control different product pricing per company account.*  |
| B2B Quote | *Allow customers to create a shipping cart and request a quote.*  |
| ERP Integration |  |

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| Custom Functionality*Include any functionality elements which you feel are custom to your business and don’t fall into the previously mentioned areas.* |
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| Data Migration*List the data which is going to be migrated from your current platform or imported into your new website.* |
| Customer Data | *Do you have customer data to be transferred/imported into the new website?*  |
| Customer Groups | *Do you have specific customer groups which need to be migrated?* |
| Company Accounts | *Do you have company accounts which need to be transferred across? Do they contain customers with existing credit balances and sub-accounts?* |
| Product Data & Images | *What product data and product images do you need to transfer / import?* |
| Order Data | *What past order data do you need to migrate/import?* |
| Blog Articles & Categories | *Do you have a blog? If so, how may articles and categories do you need to migrate?* |

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| Marketing Feeds / Tags*Detail any specific user tracking tags which need to be included and any data feeds which need to be sent to third parties.* |
| Analytics Tags | *The most common tag is Google Analytics and tag manager but there are additional analytical tags which you may wish to be implemented.* |
| Social media Tags | *Do you have social media tags, for Facebook and the like?* |
| Shopping Tags | *If you have any shopping specific tags you need to be added to the site list them here.* |
| Shopping Feeds | *Marketing your products on other platforms often requires a product feed. List any feeds you will require here.*  |
| User Tracking / CRO Tags | *Do you track user behaviour or work with a CRO agency and therefore have tracking tags to be added?* |
| Cookies | *Any specific requirements for cookies on the site?* |

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| Third Party Service Providers*Detail any current third party providers you use or you will need to integrate with as part of this project.* |
| Email Service Provider | * *DotDigital*
* *MailChimp*
* *Klaviyo*
 |
| Review Platform | * *Reviews.io*
* *Trustpilot*
 |
| Reward Platform | * *Smile*
* *YotPo*
* *Loyalty Lion*
 |
| Search Engine | * *Klevu*
 |
| Personalisation | * *Pure Clarity*
* *Nosto*
 |

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| Search Engine Optimisation*Detail your SEO requirements for the project.* |
| Robots.txt | *Do you have any specific requirements for your robots.txt file?* |
| Sitemap.xml | *Detail any specific requirements you have for your sitemap.* |
| Canonicalisation |  |
| Friendly URL’s (Inc Filtered categories) |  |

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| Blog*Detail the requirements you have for an existing or new blog as part of this project.* |
| Blog Platform | *Do you have an existing blog and require the use of a specific blog platform?* |

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| Delivery Rules & Rates*Delivery rules can be simple or very complex. Provide information on how your delivery is going to work.* |
| Delivery Options | *What delivery options do you offer your customers?* |
| Complex Delivery Calculations | *Do you have any complex delivery logic which depends on a combination of elements, such as:** *Weight vs Destination*
* *Value of basket*
* *When product 1 is added with Product 2 this happens*
* *Delivery date selector*
 |
| Click & Collect | *Do you offer click and collect to your stores, other addresses or both?* |
| Delivery Integrations | *Do you integrate with any delivery platforms for:** *Cost calculations*
* *Dropshipping*
* *3PL*
 |

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| Payment Methods*Specify the payment methods your project website will require.* |
| Credit/Debit Card | *What is the main payment service provider you use for accepting credit or debit payments?:** *Stripe*
* *Braintree*
* *Adyen*
* *SagePay*
 |
| Pay on Account | *Provide companies with a credit limit so they can Pay On Account* |
| Buy Now, Pay Later | * *Klarna*
* *ClearPay*
* *SplitIt*
* *Afterpay*
 |
| Finance | * *Klarna*
* *V12 Finance*
* *PayPal Credit*
 |
| Other Third parties | * *PayPal*
* *Amazon*
* *Google Pay*
* *Apple Pay*
* *Android Pay*
 |
| Custom Methods | * *Subscription options*
 |

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| Integrations*Does or will your new website need to communicate/transfer order, product, price or customer data to another third party system? Detail this here.* |
| Order Management System | *Do you process your orders through your website or via an Order Management System?* |
| Warehouse Management System | *Do orders need to be sent out to a warehouse or multiple warehouses for pick, pack and dispatch?* |
| Product Inventory Management System | *Do you utilise a PIM system which needs to be integrated?* |
| Point of Sale | *Do you need to integrate with a point-of-sale system within your store?* |
| Enterprise Resource Planning | *Do you need to transfer information over to an ERP platform?* |
| Marketplaces | *Do you integrate with any marketplaces like Amazon and Ebay which will need to be integrated into the website?* |
| Tax Calculations | *Third party tax systems are often used when selling to multiple countries to calculate the tax for you. Do you use one?* |

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| Ongoing Support Requirements*Post project. What level of ongoing support and maintenance do you require?* |
| General Support & Maintenance | *How many hours per month do you need?* |
| 24/7 Support | *Do you require support around the clock?* |

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| Agency Information*This section is for you to ask the agency for information about them and the team who will be part of this project.* |
| Contact Information |  |
| Registered Business Address |  |
| References |  |
| Case Studies |  |
| Company Size |  |
| Company Number |  |