

How to Dress-Up an RFP/RFI: An Outline

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Title Page

Brief, concise, relevant information with color logos of the RFP/RFI sponsor and the proposal respondent

Table of Contents

- Title of each section with corresponding page number
- Listing of service providers submitting information in the order they appear in the binder

Cover Letter

Letter of introduction from the proposal respondent about experience and goals as new broker/service provider/etc.

Plan Recommendations (as requested by proposal sponsor)

- 2-3 concise sentences about proposal respondents professional approach to making plan recommendations
- Bulleted list of recommendations (brief, concise, and relevant)

Questions for Plan Providers

- Answers provided by plan providers, not the copywriter

Conclusion

- Proposal respondent expresses understanding of what's at stake and their very important role in making it easy for the proposal sponsor
- Reiterate commitment to proposal sponsor/those the proposal will affect

List of References (prior permission given to use as reference)

List of at least four client references with name of the company, services provided, name of primary contact, their title within the company and their contact information

Formatting

- Headlines are two-four points larger than the body copy
- Headlines are all the same color (not black)
- Body copy is black
- No pictures or diagrams

A Note on Regulation Compliance

As a copywriter, I know little to nothing about financial/governmental/legal/etc. compliance regulations. It is up to the client, who is a professional in their field, to inform me/hired creatives of the specific compliance requirements for any given document—financial securities statement at the bottom of every page, for example.