



Create an RFI That Will Give You the Information You Need

Help Your Prospective Partner Assess What You're Looking For, and If You'd Be a Good Fit



For help creating a Request for Information that will streamline the process, contact Peter Osborne at peter@frictionfreecommunications.com

RFI: <Your Organization's Name>

The Prospect	Provide a description of your client or organization. Include the size and scope of your operation, any subsidiaries that might be of interest to the potential partner or provider (e.g., charitable foundations), and how someone might become a part of the organization. For example, you might include that the organization is the “exclusive licensing agent” for XXXX. For colleges and universities, you might mention whether you have an alumni association or athletic department that are either part of your organization and that you could bring to the table.
The Opportunity	What do you want? For example, are you looking to enter into a business relationship with a financial institution or fintech for the right to offer a branded credit card or deposit relationship, or to describe yourself as the Official XX of your organization? Be as specific as possible. Include information about spending habits of your typical customer or member, demographics, and anything else that will excite potential partners.
Prospect Objectives	List your primary objectives, preferably in order of importance. If the demographics of your customer base is broad, include how you’re looking for them to be treated. For example, if you’re looking for a credit-card program, you might want to ask about premium treatment and benefits for high-income customers and approval rates for less creditworthy customers to reduce the risk of fan or customer anger at you. You might want to highlight channel advantages such as in-person marketing opportunities, social media, and mailings. Where appropriate, you might want to ask about prioritizing active marketing and your willingness to self-market.
Competing Programs	Who might be a direct competitor (e.g., an athletic department for an alumni association or a local branded franchise) and which of your competitors might be offering (or looking to offer) a similar program?
Brand	In cases where there might be options, let the target know (e.g., Visa vs MasterCard).
Restrictions	Will there be any restrictions placed on the respondent’s efforts to market a product or offer something special? You can express this as both prohibitions or “being open” to XX.
Redemption Options	For programs that might be considered rewards programs, identify what you might be able to provide (tickets, discounts, access) and whether you’d like the respondent to provide ideas on how they might differentiate between your customers/alumni/members. Recognize that you’re willing to work with the partner to differentiate the program
Available Marketing Channels	What channels can you offer up? How big is your list? How many followers do you have on social media? How many people visit your website, and how many are unique visitors? Can you offer banner ads to support the program?
DEADLINES	Responses to this RFI (Expressions of Interest) are due by DATE to: Questions can be directed to XXXXX (with contact information)