

Vendor checklist

Rating the strengths

Use a spreadsheet to track and rate the vendor proposals that you get. Here is a template:

https://docs.google.com/a/wholewhale.com/spreadsheets/d/1y5p_1sLpOwr_ys0OGWqjbujOoiPBdQFOa6ZL3A8RRZ4/edit#gid=0

- Budget
- Timeline
- Quality of proposal (1 low < 5 high)
 - Did the firm try on their proposal?
 - Was it a boiler plate or customized to your RFP?
- Confidence in Design (1<5)
 - This is your feeling on what their design aesthetic is and your confidence in their ability to deliver that for your needs. If their main designer has a style you don't like, this should drop the score.
- Confidence in Functionality (1<5)
 - Is the firm outsourcing development or doing it in house? Have they completed projects like this in the past?
- Homerun factor (1<5)
 - This is a soft factor but incorporates your confidence in their team, their familiarity with your sector, and their **EXCITEMENT** about your project!
- References (1<5)
 - Talk to at least 2 references they list. Consider asking other people they have worked with.

Questions to ask Vendors

Experience

- For the key people working on your web project, how much experience do they have?
- Which staff will actually be working on the project? This is especially important at large web firms.
- Have they developed other sites for non-profit orgs?
- Have they developed other sites related to your particular cause?
- What is their background or experience in search engine optimization?
- What is their background or experience in Google Analytics and web tracking for impact?

Design

- Do all of the web projects they've recently worked on have a similar aesthetic? That's okay, as long as you like that look and feel. If not, are you confident in their capacities to expand their design?
- Do they outsource design?
- In your initial conversations about the aesthetic you're after, does the agency staff communicate in language that you can understand? Are they able to articulate back to you what you're after?

Technology

- What technologies (platforms like WordPress or Drupal and development environments like Ruby or PHP) do they have experience with?
- Do they have expertise in a particular technology? If so, ask them when it's not appropriate to use that technology? You want to avoid an agency where every problem looks like the perfect nail for their hammer.
- What changes will you be able to make to the site without their aid, or that of another designer? Ask for a demonstration on another site they've worked on for how to make those changes.
- What CRM systems (such as Convio, Democracy in Action) do their technologies integrate with?
- What CRM systems have they completed recent integration projects with?
- What are the staff training implications of the technology choices the agency makes?
- Can you talk to a customer for whom they completed an integration project?
- Are they talking about the mobile audience, and how their design will accommodate users on smaller screens?
- Do they talk about where and how to host your web project? Do they have a relationship with hosting companies?
- What considerations does the agency give to [web accessibility](#)?

Budgeting

- How will invoicing work?
- What systems and practices do they have in place to ensure that they don't exceed the agreed-upon budget?
- What happens if they find out they need to exceed the budget?
- If billed on a project basis, can 15% of project be paid on site launch + project completion?
- In their proposal, have they accounted for additional costs unrelated to staffing, such as stock photography or software subscriptions?

Process

- What are the milestones associated with their development process?
- Are they comfortable with hitting the timeline you've identified?
- If the firm uses an 'agile' approach, have them discuss how it fits with your fixed deadline.

- What software do they use to manage their development?
- How many meetings are in person vs remote?
- Who will be the project manager on the project. Ask to have a quick call with them to gauge their likability and communication style.
- How many design revisions are included in the process?
- Will the agency have a role in migrating existing website content?

Other

- Would you want to go to a party with these folks or at least spend a couple days in a cabin together? You're going to be working with them for months.
- Who will own the copyrights associated with their work on your web project?
- Have they genuinely attempted to understand your organization's goals for the web project?
- Do they speak in web marketing lingo, using terms like 'conversions' and 'calls to action'? While it's not hard to fake this, a few probing questions about previous projects should separate the fakers from the experts.
- Where is the agency located? Long distance relationships can be hard. Are they able to do a few in person meetings?
- Do they outsource their work? If so, what parts and to whom?
- Has the agency asked about the demographics of your audience? If many of them are elderly, for example, or in the developing world, then they'll want to factor these issues into their designs.
- What is their reputation? Ask your colleagues if they've heard of the agency, and what they think of them.