



RFP Tips

for Healthcare Marketers

Create smarter
RFPs to help find
your ideal partner.



RFPs: Fixing what's broken before you start

Too many healthcare RFPs launch before they're ready. Scope is vague, budgets are unclear, and critical conversations happen too late.

A recent survey of healthcare marketers and agencies shows the impact:

- **65% of marketers say** the winning vendor only "sometimes" or "rarely" meets expectations
- **88% of agencies say** RFP scopes don't match the actual project once work begins.

The data's clear: it's time to rewrite the RFP playbook and start building partnerships that actually work.

Keep reading for...

- **The most common RFP mistakes**
- **The top 5 dos and don'ts, and**
- **The ten questions agencies ask most during RFP Q&A**



Common pitfalls (and how to avoid them)

Vague scope.

More than half of marketers (53%) cite defining detailed scope as their biggest challenge, and agencies agree: 54% say poorly defined scope is their top pain point. Unclear goals and deliverables create confusion, delays, and costly change orders.

Remedy: Gather input from key stakeholders early, document measurable goals, and validate assumptions with your IT partners before issuing the RFP.

Unrealistic (or missing) budget.

Budget alignment ranked among the top three marketer challenges, while 73% of agencies said real budget guidance would make RFPs more effective. Without it, proposals vary wildly in cost and scope, wasting time on both sides.

Remedy: Share a budget range or at least cost assumptions (licensing, hosting, integrations). It helps agencies right-size their approach and makes proposals more comparable.

Combining your platform and agency partner selection.

Rushing to pick both an agency and a CMS in the same RFP creates conflicting priorities and adds guesswork. Agencies often over- or under-scope technology recommendations without a clear understanding of your goals.

Remedy: Select your agency partner first, then work with them to evaluate and recommend the best platform fit. Agencies that work across multiple stacks bring more objective insight.

Clarity is the cure for endless Q&A

When agencies ask a lot of questions, it's usually a sign that something's missing.

Across 20+ digital healthcare RFPs and 1,100+ aggregated agency questions, one pattern stands out: unclear RFPs lead to longer, more frustrating Q&A phases. And 58% of healthcare marketers say that process “takes too long and doesn't add enough value.”

Addressing the top 10 questions upfront saves time, improves proposals, and helps your RFP start with clarity instead of confusion.

The top 10 questions agencies ask during RFP Q&A

1. Has a budget or budget range been established for this project?
2. What is the target launch date, and are there key organizational milestones it must align with?
3. What are the primary goals and success metrics for the new website?
4. Who are the key stakeholders and decision-makers involved in the project?
5. What CMS or digital experience platforms are currently in use, and are you open to replatforming?
6. Are you seeking a headless/composable CMS approach or a traditional all-in-one solution?
7. What third-party integrations are required (e.g., Epic/MyChart, Kyruus, DexCare, CRM, analytics, etc.)?
8. How many websites, microsites, or domains are included in scope?
9. Will content migration be handled internally or by the selected partner?
10. What level of accessibility, privacy, and compliance (WCAG, HIPAA) is required?

Top 5 RFP Dos & Don'ts

A few key principles to keep your RFP process efficient, fair, and focused.

Top 5 Do's

1

Do the homework first.

Align internally on goals, scope, budget, and timeline before releasing your RFP. A clear brief saves weeks of confusion later.

2

Do share a budget range.

Transparency helps vendors craft realistic proposals and prevents wild pricing swings.

3

Do define what success looks like.

Set measurable goals—patient acquisition, brand lift, workflow efficiency—so proposals can be tailored to outcomes, not guesses.

4

Do make comparisons easy.

Provide a consistent structure and enforce it. Apples-to-apples responses make decisions faster and more objective.

5

Do treat it like the start of a partnership.

Be transparent, responsive, and respectful. A fair, well-managed process attracts better agencies and builds trust early.

Top 5 RFP Dos & Don'ts

A few key principles to keep your RFP process efficient, fair, and focused.

Top 5 Don'ts

1

Don't ask for spec work.

Never request creative samples or deliverables before selection—they're costly, inequitable, and disconnected from real discovery.

2

Don't combine platform and agency selection.

Choose your strategic partner first, then let them help identify the right CMS or tech stack.

3

Don't issue an RFP tied to an unfinished rebrand.

Finish the brand work first. It shapes every aspect of the website project.

4

Don't hide the budget or decision criteria

Being transparent about your budget range and evaluation criteria will reduce agency guesswork and lead to more relevant, comparable responses.

5

Don't invite everyone.

Limit your invite list to qualified contenders. A focused field leads to stronger proposals and less fatigue for your review team.

The Healthcare Marketer's Guide to Writing RFPs



Ready to make your next RFP smarter, faster, and more effective?

You've seen the data. You know what's broken. Now take the next step toward fixing it.

Sign up to get the full Healthcare Marketer's Guide to Writing RFPs—your all-in-one toolkit for building a better RFP process and choosing the right partner with confidence.

What's included

- **RFP Template** – A ready-to-use starting point for your next RFP.
- **Agency Selection Scorecard** – Align your team and evaluate partners objectively.
- **Vision & Goals Worksheet** – Build internal alignment before you start.
- **Documentation Checklist** – Know what's valuable to share during RFP and discovery.

Sign up now to receive the complete guide and toolkit after HCIC.

Make your next RFP not just a process, but a partnership.

Get the guide!