



## Pro Business Plans LLC

### Company Mission

The mission of Pro Business Plans is to provide companies with high quality materials for investment, loans, and immigration visas.

### Company Description

Started in August 2010, Pro Business Plans has quickly grown to over thirteen states and has helped over 500,000 clients raise well over \$3.0 B worth of investment capital by providing fully custom business plan writing services and investor presentations.

### Address

300 Park Ave.  
12<sup>th</sup> Floor  
New York, NY, 10022

### Phone

646 - 481 - 4579

## Project Description

We would like to design a new website to focus more on investor presentations and pitch decks, along with offering more products and services for sale. We would also like to re-design our brand to make it more professional and corporate, as we have had several complaints that it appears to be too start-up oriented and retail.

### Existing Website Updates:

Using the existing website as a framework here's what we don't like about the current site:

- It is too retail, we prefer something more 'corporate' and professional.
- It does not cross-sell services such as business registration, financial model, broker-dealer valuation, and other related services.
- It does not enable checkout and payment and customers need to call in without performing the process themselves. We want to streamline the checkout and order process to save time.
- The site is too difficult to manage. The blog is on Wordpress but we would like ideas for other CMS that does not use Wordpress for the main site because it is too slow.
- The site does not work as well on mobile devices as we would like, ideally we would have separate versions for each mobile device.

We'll need a new site that we can manage, that will look great, allow us to create products, pages, and add to it easily. The site should also be better targeted to our customers.

It's our goal that after doing the redesign of the site that we achieve \$10,000,000 in gross revenue directly from the website.

## Project Description > Design

For design we're looking to ensure the new site looks great, works on mobile devices, and allows for a simple ordering process. We would also like to increase our email newsletter list and have been more heavily involved in social media so that's also important.

Our logo is very important to be featured prominently and we use all of our colors (blue and white) throughout our marketing pieces so it will be important to include that color scheme. We have corporate ID we will provide firms as they move throughout the proposal process if necessary.

## Project Description > Programming

Ideally we would like to have the blog continuing to run on Wordpress and the other part of the site using a CMS that is fast. We actually took the main site off Wordpress because it loaded slow and was hurting our SEO rankings. However, we also want the content to be easily managed.

## Name, Email & Contact Information for Everyone Involved

First Name	Last Name	Email	Phone	Role in Project
Chase	Hughes	<a href="mailto:chase@business-plans.com">chase@business-plans.com</a>	917-592-2840	Selection Committee (Main Point of Contact)
Rebecca	Hall	<a href="mailto:rebecca@business-plans.com">rebecca@business-plans.com</a>	N/A	IT Director - will assist in selecting, and coordinate technical components
Daniel	Hartman	<a href="mailto:daniel@business-plans.com">daniel@business-plans.com</a>	N/A	Project Lead once firm selected.

Days & Times that are convenient for a follow up phone call or in-person meeting.

If additional questions are required outside of this RFP please email Chase Hughes @ [chase@business-plans.com](mailto:chase@business-plans.com) - to setup a day/time to discuss.

## Preferred Method of Contact

For now we prefer to communicate via email. As the proposal process progresses we'll make ourselves available for phone calls and possible in person meetings.

## Timelines & Milestones

### Selection Process Sample Timeline Outline:

- Request for Quotation Submitted - December 20
- Interview Period - January 12
- Responses Due - January 20
- Presentations by Vendors - January 25
- Planned Contract Award Date - February 1

### Project Outline:

*[This is a sample of an outline we use at Pro Business Plans for a complete project.]*

*Please provide a timeline for your proposal that meets the last two dates.*

- Discovery Period - Initial Meetings & Planning - [date]
- Content Production - [date]
- Wireframes & Design - [date]
- Front-End Development - [date]
- General Development - [date]
- Content Implementation & Quality Assurance Testing - [date]
- Final Review by Pro Business Plans Team - February 28
- Final Go-Live Date - March 1

## Budget

We are requesting proposals with the cost required to complete this assignment. Price will be a factor in the awarded company, but only one dimension and be weighted at 15%.

## Other Helpful Information

Having run a number of web projects before the following are very important in making a final decision and in the selection of a web development firm for this project:

- Technical Proficiency - Ability to understand all of the components involved and make recommendations.
- Proactive - Ideally we'd like to find a firm that understands our needs and makes recommendations based on their experience with web tech, rather than have to assist in the process.
- Communication - Communication is important, we'll have a fully dedicated project lead on our end and would appreciate the same. Being kept in the loop as the project moves through phases and understanding what will happen-when - so that we can coordinate with our larger marketing pieces will be important.
- Customer Service - We want to make sure we're taken care of and the company we select has ongoing healthy relationships with a number of existing clients.
- Internet Marketing Knowledge - Although not specific to this project, internet marketing will be a big part of our larger plans. Knowledge of getting a website in front of our audience is helpful.
- No Outsourcing - We've worked with direct outsource companies, and companies that outsource overseas. Every time this has failed, had delays, went over budget or was just a mess the whole way, the less time we have to spend fixing issues the better and would prefer a vendor that doesn't outsource.
- Experience - Additional relevant experience related to this project specifically, our marketing goals, or our industry are all helpful.

The final proposal should address the above, and specifically have a number of references we can call or email.