



# The Comprehensive Guide to Marketing Platform RFPs

If you find the idea of drafting a Request for Proposal (RFP) as part of the marketing platform selection process cumbersome and intimidating, you're not the only one.

The scope alone can be overwhelming, to the point that you don't even know where to start. As you worry over all the variables and factors that must be addressed, it's easy to lose sight of how important this process is; you're choosing a strategic partner who will help you take your marketing to the next level. It's like choosing a partner for a trek up Mount Everest: not just anyone will do, and making the wrong choice could have dire consequences.

**But fear not, the RFP, as daunting as it may seem, actually simplifies the process for you. It allows you to compare potential candidates on a level playing field, down to as fine a detail as you like.**

Many marketers are intimidated by RFPs because it's hard to know just what to ask, particularly when it comes to rapidly changing marketing technology. How do you know you've included all the important questions? How do you justify the meticulous research and organization you'll have to do just to write the RFP? You long for anything that would save you time without sacrificing comprehensive attention to detail.

RFPs come in many forms, but this guide specifically shows how to organize and write an RFP that will help you select the best marketing platform for your company. We have also included a template for you to download, customize, and start using right away.

---

*You're choosing a strategic partner who will help you take your marketing to the next level*

---



## Elements of a Good RFP

The RFP is used very early in the buying process, where the relationships between your company and prospective partners are established. Like any relationship, determining if it will be a good fit depends greatly on how much you know about each other up front.

In that regard, the RFP is a communication tool that allows both parties to size each other up and determine grounds for mutual trust. Depending on the industry you're in and the purchase you're looking to make, Requests for Proposals vary, both in structure and the types of questions asked. The following tips, though, should help optimize the results of any RFP processes related to the purchase of a marketing platform.

- ▶ Begin with an executive summary or a project overview, outlining the purchase you're looking to make and the objective(s) you want to accomplish.
- ▶ In addition to communicating the goals you want to accomplish by contracting a partner, it might be a good idea to include your company's pain points, and leave it to the partner to answer how they'll address those points.
- ▶ Steer clear of Yes/No questions. The vendor's ability to answer open-ended questions will reveal a great deal about their experience and ability to help achieve your goals.
- ▶ Data is your greatest asset, so don't be afraid to ask specific questions about how the vendor will handle your data, or how you can access it.
- ▶ Listing values is optional, but something you may want to consider if you've encountered clashes of culture or values in the past.
- ▶ Be wary of responses full of technical jargon and specifics about product functionality, yet lacking in descriptions of services and resources. Request specific information about the support that will be available to guide you through onboarding and implementation, and in overcoming challenges that may arise during the process.
- ▶ Pay close attention to the way each vendor responds to questions about innovation. If their answers have little to no mention of personalization, automation, or how they incorporate artificial intelligence technology into the platform, you need to keep looking for a more forward-thinking provider.
- ▶ Suggest that vendors include diagrams, screenshots, or other visuals to illustrate the solutions they provide.

---

*The RFP is a communication tool that allows both parties to size each other up and determine grounds for mutual trust.*

---

## RFP Section Goals

While there are many ways to build an RFP, they are typically made up of sections, each with a specific goal. What follows is an example of the sections that might be included in an RFP for a marketing partner.

COMPANY OVERVIEW	In the opening section of the RFP, the prospective vendor provides basic company information.
DIFFERENTIATORS	The vendor lists advantages, strengths, and unique identifiers that differentiate them from the competition.
PRODUCT INNOVATION	The vendor explains how its platform was developed, as well as any related products. It should also cover how it allocates funding to product R&D, how its product roadmap works, and what its update schedule looks like. You also want to see how the vendor breaks down the impact of its solutions on multiple channels like email, mobile, social media, text or SMS, web, and even offline channels like direct mail.
INFRASTRUCTURE	This section covers data flow and architecture, as well as backup, disaster recovery and business continuity systems, platform availability, system maintenance, and so on.
SECURITY	Critical to the RFP evaluation, the security section should include questions about security policies, past breaches and how they were handled, physical data center security measures, and internal employee security controls. Also ask for a description of data storage and protection controls and how they apply to customer data, including any encryption and decryption management procedures.
CUSTOMERS	This section shows how the vendor's product and services will work with your company. In our template, we break the customer portion into three subsections, covering how the partner's data platform integrates with your company, how customer segmentation is conducted, and the partnership's impact on customer lifecycle management.

CONTENT	The vendor describes their content management and product recommendation capabilities. Since this section covers how customers will actually see your products and experience your brand, the vendor should include some examples showing how they will use content to help you reach your audience.
CHANNELS	This section explains the vendor's specific capabilities relating to the channels that are part of your e-commerce operations. These might include email, real-time transactional messaging, mobile, SMS, push notifications, and social media. There should be answers covering send time optimization, device targeting, and platform integration.
AUTOMATION	Here you should find out how automation features work, such as which events can trigger automated marketing actions, and how much control your users will have over the automation capabilities.
DELIVERABILITY	Hard questions about email deliverability and the metrics used to measure performance and cite problems are answered in this section.
ANALYTICS	The vendor provides information on its analytical capabilities to track response rates for multiple timeframes, click-to-open ratios, mobile reporting, and A/B testing.
SERVICES AND SUPPORT	The final section gathers all the information about the prospective partner's ability to implement a marketing solution, support the client through the onboarding process and beyond, and manage the account throughout the life of the contract.



## Summary

Not all marketing platforms offer the same services or features, which is why it's so important that your RFP helps you compare them accurately. These tips should prepare you to collect the information needed to compare prospective vendors on your terms, not theirs.

Additionally, our marketing RFP template was designed to help make the whole process easier. Customize it to meet your specific needs, and be sure you get all the information you need from every prospective vendor to make this important decision. Remember, you wouldn't

partner with just anyone to climb Mount Everest. Selecting the right partner for your marketing platform is an important, strategic, long-term decision, with large-scale consequences. Choose wisely.

We hope you'll include Emarsys in the search for your company's ideal marketing platform. Interested in learning more? Request a demo at [emarsys.com/request-a-demo](https://emarsys.com/request-a-demo)