



# The Essential Guide to Writing a Marketing Tech RFP



# Elements of a Good RFP

If you find the idea of drafting a Request for Proposal (RFP) one of the more cumbersome and intimidating parts of a MarTech selection process, you're not alone.

It's like choosing a partner for a trek up your own Mount Everest: not just anyone will do, and making the wrong choice could have dire consequences.

That is where a well-crafted RFP becomes your greatest tool in making that decision.

The RFP should be a comprehensive business proposal that expresses the needs of your business that requires vendors to map out the value they will provide for each requirement.

# The Purpose of RFP Documents

*Request for Proposal  
is how you pick  
the MarTech to meet  
your brand's needs.*

The RFP does two important things:

## 1 **Benchmarks technology vendors**

The proposal levels the playing field so you can compare features or services in an equal way without sales pitches getting in the way.

## 2 **Aids decision making**

By mapping out needs against technical capabilities and price, the RFP lets you make an informed decision on what solution will benefit your business the most.

However, the effectiveness of the proposal depends on the depth and insightfulness of the questions you ask in your RFP.

This guide helps you: find out what questions to ask, organize your RFP, and pick a technology partner that will accelerate business results.

# Frame Your Business Needs

The RFP is used early on in the buying process, when you need to be able to compare the different vendor offerings and try to make sure that you are selecting the best solution for your needs.

Determining if it will be a good fit depends on how much you know about each vendor, and that is where the RFP is so valuable as it provides the best way to explore a good fit.

Before you start writing the proposal itself, you need a clear overview of what your brand needs are to make sure you get the most accurate information from a prospective partner.

## 1 Write an executive summary.

Begin with a project overview and outline what you are looking to buy and what top-level objectives it will help achieve.

## 2 Write down your goals.

Whether it's increasing customer retention or implementing a loyalty program, state your company's goals and your high-level objectives like increasing revenue.

## 3 Write down your pain points.

Explicitly stating your pain points allows vendors to outline how their tech will help address these issues.

# General Tips

Keep the following in mind when you're writing out your questions:

## Do

- ▶ **Ask questions about your data.**

First-party data is your company's greatest asset, so ask detailed questions about how the vendor will handle your data and how you can access it.

- ▶ **Look into culture compatibility.**

Listing your company's values is optional, but it's something to consider if you've encountered clashes of culture or values with vendors in the past.

- ▶ **Look for an innovative partner.**

Pay close attention to how each vendor responds to questions about innovation as their attitude to it tells you a lot about your long-term ambitions.

- ▶ **Ask for additional visual resources.**

Suggest that vendors include diagrams, screenshots, or other visuals to illustrate the solutions they provide.

## Don't

- ▶ **Ask Yes/No questions.**

The way a vendor answers open-ended questions reveals a great deal about their experience and ability to help achieve your goals.

- ▶ **Be vague.**

The more detailed your questions the better the vendor can evaluate whether they can deliver what you want.

- ▶ **Prioritize tech features over business value.**

Be wary of responses full of technical jargon and only specifics about product functionality, yet lacking in descriptions of services, resources, or business value.

- ▶ **Assume you have the same definition of support.**

Definitions aren't universal, request specific information about the support that will be available to guide you through onboarding, implementation, and beyond.



# RFP Section Goals



While there are many ways to build the RFP, the proposal is typically made up of relevant sections, each with a specific goal. What follows are example sections to include in your RFP when looking for a new marketing technology partner.

## Top Level Considerations


COMPANY OVERVIEW	Understanding key aspects of the company in terms of size, history, footprint, etc. helps you partner with someone who can scale with you.	<ul style="list-style-type: none"><li>▶ How old is the company?</li><li>▶ Where are they based?</li><li>▶ How many employees do they have?</li></ul>
DIFFERENTIATORS	This is where the vendors highlight their own USPs and how they stack up against the competition – which can give ideas on what additional questions to ask, or topics to drill down on.	<ul style="list-style-type: none"><li>▶ What sets them apart from the competition?</li><li>▶ How are they uniquely able to help?</li><li>▶ What is unique about the tech?</li><li>▶ How is their tech better than the competition?</li></ul>
PRODUCT INNOVATION	Since tech evolves at an incredibly rapid pace, you need to know what the vendor does to stay in front of the competition.	<ul style="list-style-type: none"><li>▶ How is funding allocated to R&amp;D?</li><li>▶ How does the product roadmap work?</li><li>▶ What does the update schedule look like?</li></ul>

*The RFP is the benchmarking tool that sets expectations and lets you to size up vendors.*

# Data and Infrastructure

<p>INFRASTRUCTURE</p>	<p>Their ability to deliver for your brand is critical, so assess their current capabilities and headroom carefully.</p> <p> <b>Ask for diagrams!</b></p>	<ul style="list-style-type: none"> <li>▶ What are their SLAs and uptime like?</li> <li>▶ What does their backup policy look like?</li> <li>▶ Can they provide disaster recovery and business continuity overviews?</li> <li>▶ How often is system maintenance performed?</li> </ul>
<p>SECURITY</p>	<p>As caretakers of your data and brand's digital equity you need to pick a partner that takes security seriously.</p>	<ul style="list-style-type: none"> <li>▶ What do their security policies look like?</li> <li>▶ What data security measures are in place?</li> <li>▶ What kind of user roles and policies do they have?</li> <li>▶ What certifications (e.g. ISO 27001) do they have?</li> </ul>
<p>CUSTOMER DATA</p>	<p>Understand what data can be integrated, how you can integrate it, and what you will be able to do with it.</p> <p> <b>Ask for diagrams!</b></p>	<ul style="list-style-type: none"> <li>▶ What integration points do they offer?</li> <li>▶ What real-time integrations are available?</li> <li>▶ What are the segmentation capabilities?</li> <li>▶ What customer lifecycle options are there?</li> <li>▶ What privacy and permission compliance mechanisms do they offer?</li> <li>▶ What laws and policies (GDPR, IDFA, CCPA, BDSG, etc.) do they comply with?</li> </ul>

# Content & Execution

<p>CONTENT</p>	<p>You need to know how complex the content creation is and what kind of UX you will be able to deliver, as the way your customers experience your brand is critical to your success.</p>	<ul style="list-style-type: none"> <li>▶ What does content creation look like?</li> <li>▶ What are the product recommendation capabilities?</li> <li>▶ Do they offer omnichannel personalization tokens?</li> <li>▶ What global features and localization do they support (language, encoding, etc.)?</li> </ul>
<p>CHANNELS</p>	<p>Channel capabilities are at the heart of engagement and providing a consistent and meaningful experience, so you need to know what kind of customer journey their technology will let you deliver.</p> <p> <b>Ask for diagrams!</b></p>	<ul style="list-style-type: none"> <li>▶ Please list all available channels</li> <li>▶ Are channels natively integrated?</li> <li>▶ Is Transactional Messaging available?</li> <li>▶ How easy is it to integrate personalization in omnichannel campaigns?</li> <li>▶ What device-targeting capabilities are available?</li> <li>▶ What is their 3rd party integration connectivity like?</li> <li>▶ Do they have any AI capabilities that help with execution?</li> </ul>
<p>AUTOMATION</p>	<p>You need to know what automation is possible, what you can do with it, and what working it will be like.</p>	<ul style="list-style-type: none"> <li>▶ Which events can trigger automated marketing actions?</li> <li>▶ Can running automations be paused, edited, and resumed?</li> <li>▶ Can automated A/B/N testing be included?</li> <li>▶ Do they offer pre-built, pre-populated programs?</li> </ul>



# Reporting & Support

DELIVERABILITY	Email is the critical channel for marketers, email needs to get where it is sent – and you need to know that your vendor is equipped to help make sure that happens.	<ul style="list-style-type: none"> <li>▶ What kind of pre-flight checks do they offer?</li> <li>▶ List all partnership certifications, e.g. CSA, ReturnPath, etc.</li> <li>▶ How do they measure performance?</li> </ul>
ANALYTICS	Analytics and reporting is how you keep marketing on target, so you need to understand the scope of the capabilities offered, what aspects can be measured, and how their tech keeps you aligned with the rest of the business.	<ul style="list-style-type: none"> <li>▶ Do they offer campaign level reporting?</li> <li>▶ Do they offer automation level reporting?</li> <li>▶ Do they offer customer lifecycle reporting?</li> <li>▶ Are there any AI prediction accuracy reports?</li> <li>▶ Can custom reports be built?</li> <li>▶ Can reports be fed into automations?</li> <li>▶ Do they offer vertical-specific reports?</li> <li>▶ Do they offer business-goal oriented reporting?</li> </ul>
SERVICES AND SUPPORT	When investing in tools, you need to know what it takes to master it, what kind of support you can expect from onboarding to training, or if they offer add-on services to expand operational capacity.	<ul style="list-style-type: none"> <li>▶ Is onboarding outsourced or provided in-house?</li> <li>▶ Do they offer recurring campaign services?</li> <li>▶ Do they offer strategic consultancy?</li> <li>▶ Is there a designated technical adoption team?</li> <li>▶ What channels is support available on?</li> <li>▶ Is there unlimited 24/7 support available?</li> <li>▶ What are their support SLAs?</li> </ul>

# Summary

The RFP is a benchmarking tool, built around your business needs that helps you determine which vendors will be able to deliver the solutions your company needs.

Not only does it accelerate the selection process, but the RFP is also the most efficient way to find the right technology vendor for your company.

Choosing the right partner for your marketing platform is an important, strategic, long-term decision, with large-scale consequences.

These tips will prepare you to collect the information you need to compare prospective vendors on your terms, not theirs.

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