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An SAP Company

# 2024 MarTech RFP Guide:

## Plan, Write, & Manage a Successful Proposal

Proven strategies for transforming your tech selection process from a big pain to a big gain

85+ sample questions inside!

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# Why Run an RFP?

If you find the idea of managing and drafting a Request for Proposal (RFP) a cumbersome part of the MarTech selection process, you're not alone. Many people wonder why they have to go through an RFP at all — and in fact, it isn't always necessary.

The first question you ask should be, "Do I really need an RFP to make this decision?" If not, great! However, if for one reason or another an RFP is unavoidable, this guide can help. A well-crafted, well-run RFP will empower you to select the MarTech (ESP, CDP, CX, etc.) that meets your business needs. The RFP does two important things:

1. **Benchmarks technology vendors:** Evaluate the playing field so you can compare features and services in an objective way without sales pitches.
2. **Aids decision making:** By mapping out needs against technical capabilities and price, the RFP helps you make an informed decision on what solution will benefit your business the most.

The effectiveness of your RFP depends on the depth and insightfulness of the questions you ask and also on how you manage the process. In this guide, you will find questions you should ask and essential strategies for running an RFP. So get ready to pick the technology partner that will accelerate your business results.

# Writing an RFP

Your RFP document should be a comprehensive business proposal that expresses the needs of your business. It's the foundation vendors will use to map out the value they can provide for each requirement.

RFP documents commonly include:

- **A brief overview of your business**
- **A statement of your objectives for the RFP**
- **Guidelines for the RFP timeline and submission**
- **Legal disclaimers and/or expectations**
- **The list of requirements**
- **Up to 4 use cases unique to your needs and biggest pain points**

The list of requirements makes up the bulk of the RFP, and the sample questions in this ebook can help you build your list.

Remember: You're not in this alone! You can and should gather requirements and questions from stakeholders. For example, IT should provide questions about data security, and HR might want to ask about vendors' hiring practices.

**After gathering questions from multiple departments, you'll likely have some repeats. Eliminating redundant questions can save you time in the review phase.**

# RFP Writing Do's and Don'ts

Keep the following do's and don'ts in mind when you're writing your questions:

## Don't

**Ask yes/no questions.**

Yes/no questions yield short replies; instead, encourage vendors to share their experiences and provide thoughtful, detailed insight.

**Be vague.**

When questions lack specificity or clarity, vendors won't be able to properly evaluate your needs and whether they can deliver what you want.

**Prioritize tech features over business value.**

Instead, ask questions that lead vendors to give you descriptions of services, resources, and 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.

# Do

- **Ask questions about data management.**

  First-party data is your company's greatest asset. 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 consider doing so if you've encountered clashes of culture or values with vendors in the past.

- **Look for an innovative partner.**

  Pay close attention to how vendors respond to questions about innovation. Their responses will tell you a lot about their long-term goals.

- **Ask for additional visual resources.**

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

- **Know your stakeholders.**

  Include all relevant stakeholders from the start. A stakeholder who's left out of the planning process could interrupt your timeline to make changes (such as adding requirements).

- **Request a personalized demo.**

  See the solution in action!

# RFP Requirements List, Section by Section

Although there are many ways to build an RFP, the requirements list is typically made up of business-relevant sections, each with a specific goal. What follows are example sections and questions to include in your RFP when looking for a new marketing technology partner.

## Vendor Information

**Company Overview**

Ask questions that will help you understand key aspects of the company in terms of size, history, footprint, etc. Find a partner who can scale with you.

- How old is your company?
- Where are you based?
- How many employees do you have?

**Differentiators**

Invite vendors to highlight their best qualities. See how they stack up against the competition. A great answer here will invite conversation and inspire more questions.

- What sets you apart from the competition?
- How are you uniquely able to help?
- What is unique about your tech?
- Do you own your sending infrastructure or use white-labeled third-party tools?

### Product Innovation

Tech evolves at an incredibly rapid pace. Ask questions that will uncover what the vendor does to stay ahead of the competition.

- How is funding allocated to R&D?
- What's scheduled on the product roadmap for the next year?
- What does the update schedule look like?
- How often are updates released?
- What programs are in place to inform customers of product updates?
- What programs enable users to provide direct product feedback?
- Do you have any events where new products are launched?

## Data and Infrastructure

### Infrastructure

The vendor's ability to deliver for your brand is critical, so ask questions that will let you assess their current capabilities and headroom carefully.

**Ask for diagrams!**

- What are your SLAs and system uptime?
- Do you have a client-facing availability and performance tool that can be viewed?
- What are your backup policies?
- Can you provide disaster recovery and business continuity overviews?
- Describe the scalability of your system (i.e. volume of email, SMS, push, etc.).

### Security

The vendor will become a caretaker of your data and brand's digital equity, so pick a partner that takes security seriously. Ensuring customer data is secure builds trust in your brand, so ask these pointed questions!

- What are your security policies?
- Where are your data centers hosted?
- What data security measures are in place?
- What are your user roles and policies?
- What certifications (e.g. ISO 27001) have you completed?

**Customer Profile Management**

Ask the vendor what data can be integrated, how you can integrate it, and what you will be able to do with it.

**Ask for diagrams!**

- What integration points do you offer?
- What data integrations do you have?
- Describe your partner ecosystem.
- Can we quickly act on the data brought into the system?
- How easy is it to integrate different data points?
- Can you connect online and offline channels (in-store, sales, service)?
- What are the segmentation capabilities?
- What customer lifecycle options are available?
- What privacy and permission compliance mechanisms do you offer?
- What laws and policies (GDPR, IDFA, CCPA, BDSG, etc.) do you comply with?
- What capabilities are there for mapping first-party and third-party audiences?
- Describe your approach to cookieless tracking.

# Personalization and Execution

### Content

If the software involves content creation, ask the vendor how complex the creation process is and what kind of UX you'll be able to deliver. The way customers experience your brand is critical to your success.

- What does content creation look like?
- What are the product recommendation capabilities?
- Do you offer omnichannel personalization tokens?
- What global features and localization do you support (language, encoding, etc.)?
- How do you handle language translation?
- How difficult is it for a user to create and optimize content within the UI?
- Do you need a Digital Asset Management (DAM) system as part of the content experience?

### Channels

Channel capabilities are at the heart of engagement and providing a consistent and meaningful experience. Ask about what kind of customer journey the technology will empower you to deliver.

**Ask for diagrams!**

- List all available channels.
- Are channels natively integrated?
- Describe the ease of use around sending both transactional and promotional messages.
- How easy is it to integrate personalization in omnichannel campaigns?
- What device-targeting capabilities are available?
- Describe your third-party integration connectivity.
- Do you have any AI capabilities that help with management or execution?
- How do you connect online and offline experiences?

**Deliverability**

Content needs to arrive wherever you're sending it (whether it's email, SMS, etc.) — and you need to ask whether your vendor is equipped to help make sure that happens.

- What kind of pre-flight checks do you offer?
- What guardrails (if any) are in place to ensure content is sent to the proper audience?
- List all partnership certifications, e.g. CSA, ReturnPath, etc.
- How do you measure deliverability performance?
- How do you measure the deliverability of SMS?

**Campaign Workflow and Automation**

Ask probing questions about what automation is possible, what you can do with it, and what working with it will be like.

- What events can trigger automated marketing actions?
- Can running automations be paused, edited, and resumed?
- What are your capabilities for automated A/B testing?
- Can a user preview dynamic personalization before a send?
- Do you offer pre-built, pre-populated automated campaigns?
- How easy is it for a user to create an automation/customer journey? Is coding required?
- How easy is it to change or optimize this automation once it's up and running?
- How much guidance does your system provide in campaign creation?
- What channels are available inside of a single automation?

### Loyalty

Ask about available loyalty modules. You need to understand your most loyal consumers and what experience to put in front of them at the exact moment and on the channel that will drive the highest conversion.

- Please describe any loyalty module available directly within the platform.
- Do you support voucher management?
- Are you able to share coupons via mobile wallet?
- Do you work with any loyalty solution partners? Please list and describe partners.
- How accessible is loyalty data when it comes to triggering an action or connecting with your omnichannel strategy?

# Analytics and Support

### Analytics

Analytics and reporting keep marketing on target, so you need to understand the vendor's capabilities. Ask what aspects are measurable, and how the tech keeps you aligned with the rest of the business.

- Describe available standard reports (i.e. campaign-level, automation-level, customer lifecycle, and AI prediction accuracy reports).
- What types of dashboards are available?
- How are campaign metrics tied to business outcomes?
- What options are available for custom reporting?
- Can reports be fed into automations?
- Do you offer vertical-specific reports?
- What methods do you have to connect platform data to third-party BI and Visualization tools?

### Services and Support

When investing in a tool, you need to know what it takes to master it. Ask what kind of support you can expect from onboarding to training, and whether add-on services are available to expand operational capacity.

- Is onboarding outsourced or provided in-house?
- Do you offer recurring campaign services?
- Do you offer strategic consultancy?
- Do you offer consultancy around best practice for omnichannel designs?
- Is there a designated technical adoption team?
- What support channels (phone, web, etc.) are available?
- Is there unlimited 24/7 support available?
- What are your support SLAs?

# Running an RFP

How you manage your RFP is just as important as the effort you put into writing it. The RFP kicks off the process of comparing vendor offerings to ensure you're selecting the best solution for your needs.

Before you start writing the proposal, make sure you have a clear understanding of:

1. **Your company's unique requirements**

   Find out the pain points users are experiencing with your current software (or lack of software). Then determine your goals, such as increasing customer retention, implementing new functionality, increasing revenue, or any other objective.

2. **How the vendor landscape has evolved in recent years**

   Do your research! Browse vendor websites, watch demos, and talk to representatives. Read reviews on sites like G2, Email Vendor Selection, and TrustRadius, and review reports from analysts like Gartner.

Make sure the vendors you decide to invite to the RFP (usually about 6–8) are vendors who can actually help your business. Understand the vendor landscape before the RFP process begins.

**It's hard to know what you don't know. Consider hiring an RFP consultant who specializes in the type of software you're buying. Consultants can help you better understand the industry landscape and even your own requirements.**

# The Timeline of an RFP

Your timeline will be unique to your business. In particular, time to migrate can vary greatly depending on software. Also, the more vendors you invite to the RFP, the more time you'll need for presentations and review.

An RFP will always take longer than you expect. Plan for it to run long. In fact, a general rule is that after you estimate your timeline, you should double it.

**The following is a general timeline for an RFP process:**

| Create RFP | Vendor Response Period | Review and Score | Vendor Presentations | Negotiation |
|---|---|---|---|---|
| 2–4 weeks | 3–4 weeks | 2–3 weeks | 1 week | 3–4 weeks |

You must plan your timeline around your existing contract. You don't want to get into a situation where you're in the middle of an RFP and your contract is about to expire. Also, check your contract for the notice period for your renewal.

**If your contract expires in just six months, starting the RFP process right now could land you in a pickle with your current vendor. And don't forget that migration takes time, too!**

# General RFP Management Tips

These additional tips can help you manage your RFP successfully:

- **Make the RFP as long as it needs to be, but no longer.**
  The questionnaire should be only as long as you and other reviewers are willing to read, compare, and score the responses for each requirement from each vendor.
- **Give yourself enough time.**
  It bears repeating: Brands rarely give themselves enough time for the full RFP process, so start early.
- **Negotiate a contract extension with your vendor before starting the RFP.**
  If your current vendor doesn't win the RFP, but you run out of time to complete the process and migrate, you could end up in a bind. Negotiate while you still have leverage.
- **Use a scorecard.**
  Get input from all key stakeholders to ensure an objective decision process. A spreadsheet can greatly help with this. Use scorecards to review both written responses and live presentations.

**Scorecards provide a historical record. If any leaders question the vendor selection later, scorecards make the decision clear.**

# Summary

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

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

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

One last tip, and this one's important: Make a final decision. This seems obvious, but many RFPs don't end in a decision, often because people get busy or distracted. Make this step a priority and keep your eye on the prize — better MarTech means better outcomes, and ultimately more revenue!

# About Emarsys

SAP Emarsys Customer Engagement is an intelligent customer experience solution from SAP to help brands connect customer data, improve loyalty, and grow their business.

SAP provides an integrated suite of applications, intelligent technologies, and a real-time platform for retailers to drive efficiency and deliver relevant, personalized customer experiences anywhere, anytime. We help digitally native start-ups to global retail brands manage all aspects of their business with the comprehensive solutions to exceed customer expectations with relevant products, information, and engagement when and where they choose to shop. This includes SAP retail and customer experience solutions like leading e-commerce, customer data, and customer engagement marketing applications, enabling brands to be amazing every time by delivering an intelligent customer experience. For more information, visit [www.emarsys.com](http://www.emarsys.com)

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