

MarTech RFP Guide:

**Plan, Write, & Manage
a Successful Proposal**



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Why Run an RFP?

If you find the idea of managing and drafting a Request for Proposal (RFP) one of the more cumbersome and intimidating parts of a MarTech selection process, you're not alone. Many people wonder why they have to go through it at all.

It's absolutely worth your time for one reason: **A well-crafted, well-run RFP is your greatest tool for selecting MarTech (ESP, CDP, CX, etc.) that meets your business needs.**

The RFP does two important things:

- ▶ **Benchmarks technology vendors:** Evaluate the playing field so you can compare features and services in an objective way without sales pitches.
- ▶ **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 not only on the depth and insightfulness of the questions you ask, but also on how you manage the process. This guide helps you with both. Find out what questions you should ask, discover the essential strategies for running an RFP, and get ready to pick the technology partner that will accelerate 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:

1. A brief overview of your business
2. A statement of your objectives for the RFP
3. Guidelines for the RFP timeline and submission
4. Legal disclaimers and/or expectations
5. The list of requirements
6. 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 remainder of this book focuses on helping you build it.

Remember: You're not in this alone! You can and should gather requirements and questions from stakeholders. For example, IT should provide questions about 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 later on in the review phase.

RFP Writing Do's and Don'ts

Keep the following 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 your data.**

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 it's something to consider if you've encountered clashes of culture or values with vendors in the past.

✓ **Look for an innovative partner.**

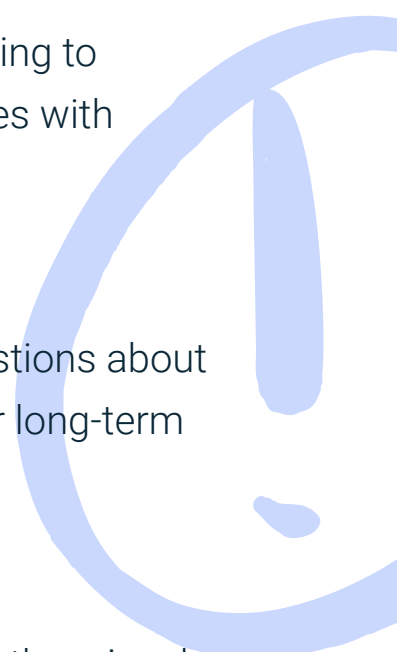
Pay close attention to how each vendor responds to questions about innovation. Their attitude to it will tell you a lot about their long-term ambitions.

✓ **Ask for additional visual resources.**

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

✓ **Request a personalized demo.**

See the platform 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?
- ▶ How is your tech different from the competition?

Product Innovation

Tech evolves at an incredibly rapid pace. 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?

Data and Infrastructure

Infrastructure

The vendor's ability to deliver for your brand is critical, so assess their current capabilities and headroom carefully.



Ask for diagrams!

- ▶ What are your SLAs and system uptime?
- ▶ 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.

- ▶ What are your security policies?
- ▶ 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

Understand 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, you need to know 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 difficult is it for a user to create and optimize content within the UI?
- ▶ Do you need a Digital Asset Management (DAM) as part of the content experience?

Channels

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 the technology will empower you to deliver.

- ▶ 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?



Ask for diagrams!

Deliverability

Content needs to arrive wherever you're sending it (whether it's email, SMS, etc.) – and you need to know that 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

You need to know 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 programs?
- ▶ How easy is it for a user to create an automation/customer journey?
- ▶ 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?

Analytics and Support

Analytics

Analytics and reporting keep marketing on target, so you need to understand the vendor's capabilities, 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 type 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?

Services and Support

When investing in a tool, you need to know what it takes to master it, 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?
- ▶ 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 by 2%, 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 Stakeholders of an RFP

Include all relevant stakeholders in the planning processes from the start. Ensure that everyone is aware of what's at stake as well as why they have a vested interest in the final outcome.

The consequences of leaving out a stakeholder can be surprisingly high. A stakeholder who's left out of the beginning stages of the RFP could interrupt your timeline to make changes (such as adding requirements).

RFP stakeholders typically include:

- ▶ Marketing director(s)
- ▶ Marketing end users (e.g. email marketing team)
- ▶ RFP manager and/or consultant
- ▶ An IT resource
- ▶ Procurement

Depending the type of software in question, stakeholders may also include:

- ▶ Sales director(s)
- ▶ Sales end users



Legal and finance departments will also have an interest in the RFP. These departments are secondary stakeholders.

The Timeline of an RFP

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.

Always remember that 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. 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!

The actual timeline will be unique to every business. In particular, time to migrate can vary greatly depending on software.



Keep in mind that the more vendors you invite to the RFP, the more time you'll need for presentations and review.

Here's a general timeline for an RFP process:



General RFP Management Tips



These additional tips can help you your 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, better outcomes, and ultimately more revenue!

Curious about what Emarsys does
and how it can help your brand?

[Watch our 3-minute Demo ▶](#)



About Emarsys

Emarsys, now an SAP company, empowers digital marketing leaders and business owners with the omnichannel customer engagement platform built to accelerate business outcomes.

By rapidly aligning desired business results with proven omnichannel customer engagement strategies – crowdsourced from leading brands across your industry – our platform enables you to accelerate time to value, deliver superior one-to-one experiences and produce measurable results... fast.

Emarsys is the platform of choice for more than 1,500 customers around the world. Join thousands of leading brands who trust Emarsys to deliver the predictable, profitable outcomes that their businesses demand and the highly personalized omnichannel experiences that their customers deserve. For more information, visit www.emarsys.com

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