



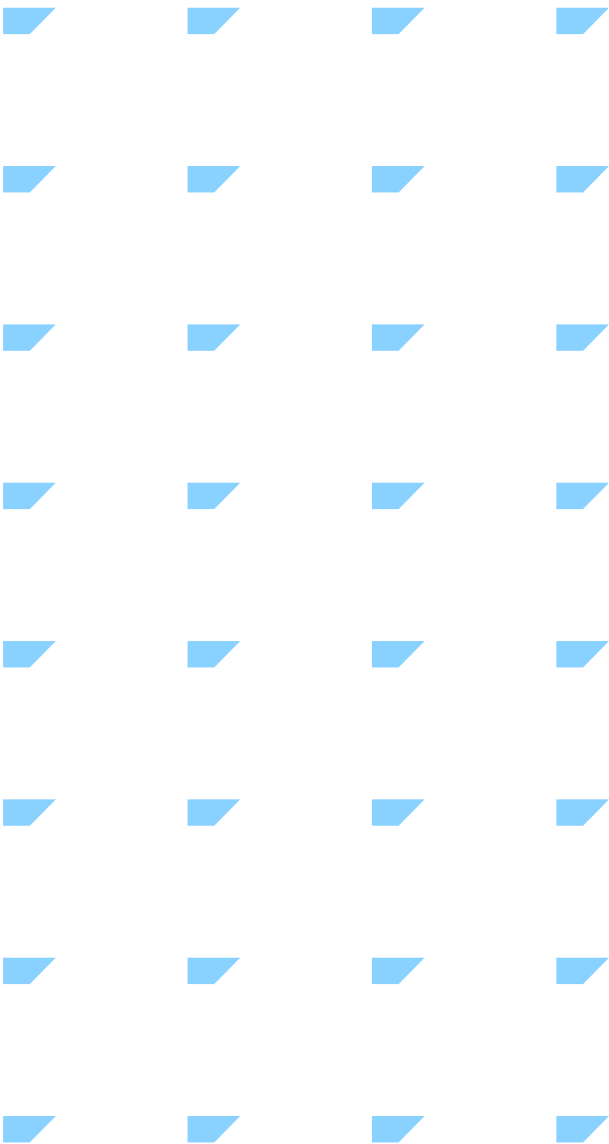
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sample  
questions!

# 2026 Martech RFP Guide

Plan, Write, and Manage  
a Successful Proposal

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## Writing an RFP: Do's and Don'ts

A well-written, well-run RFP will empower you to select the martech that meets your business needs for email marketing (ESP), customer data (CDP), or even customer experience (CX).

### Why this matters:

Your RFP will help you compare solutions objectively by mapping needs against capabilities and price. Writing questions succinctly and clearly is critical to achieving a successful outcome; namely, making a final decision. Your final RFP document should be a comprehensive proposal that expresses your business needs.

The effectiveness of your RFP depends both on the insightfulness of your questions and how you manage the process, so be sure to avoid these common pitfalls.

### RFP Do's

#### Ask questions about data management.

First-party data is your company's greatest asset. Ask how the vendor will handle your data and how you can access it.

#### Look for an innovative partner.

Pay close attention to how vendors respond to questions about innovation so you can learn about their long-term vision.

#### Ask for additional visual resources.

Request that vendors include diagrams and interface screenshots.

#### Involve your stakeholders.

A stakeholder who's left out at the writing stage could interrupt your timeline to make changes.

#### Request a personalized demo.

See the solution in action! Ask how others in your industry are using the tool.

### RFP Don'ts

#### Ask all yes/no questions.

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.

#### Prioritize tech features over business value

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

#### Assume you have the same definition of support.

Definitions aren't universal. Request information about how the vendor supports you through onboarding, implementation, and beyond.



## RFP Requirements List: Sample Questions

The requirements list in an RFP is typically made up of business-relevant sections, each with a specific goal. Following are example sections and questions to include in your RFP for a new marketing technology partner.



**Ask for diagrams and supporting images, such as diagrams of the infrastructure, customer profiles, and dashboards.**

### 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?
- What geographies/regions do you support?
- How many employees do you have?
- What industries do you work with?
- What market segments do you work with?
- What sets you apart from your top competitors?
- What are the core competencies of your marketing solution?

## Product Innovation

Tech evolves at an incredibly rapid pace. Ask questions that will uncover what the vendor does to keep up with industry trends.

- What percentage of revenue is allocated to R&D?
- What is your process for adding emerging or related technologies to your product suite?
- What's scheduled on the product roadmap for the next year, and how do customers access it?
- How do you prioritize new features and innovations in your product roadmap?
- What does the product update/release schedule look like?
- How often are updates released?
- What programs are in place to inform customers of product updates?
- How do you enable users to provide direct product feedback?
- What opportunities exist for customers to participate in driving innovation?
- What events or opportunities do your customers have to connect with the peer and product community?
- How have customer suggestions led to significant product changes or new features?







## Data and Infrastructure

### Infrastructure

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

- Do you own your sending infrastructure or use white-labeled third-party tools?
- What are your SLAs and system uptime?
- Do you have a client-facing system 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.).
- What languages can your system UI translate?
- How does your solution scale to handle traffic during peak business seasons?
- How do you ensure your solution can integrate with a complex marketing technology landscape?

## Security and Compliance

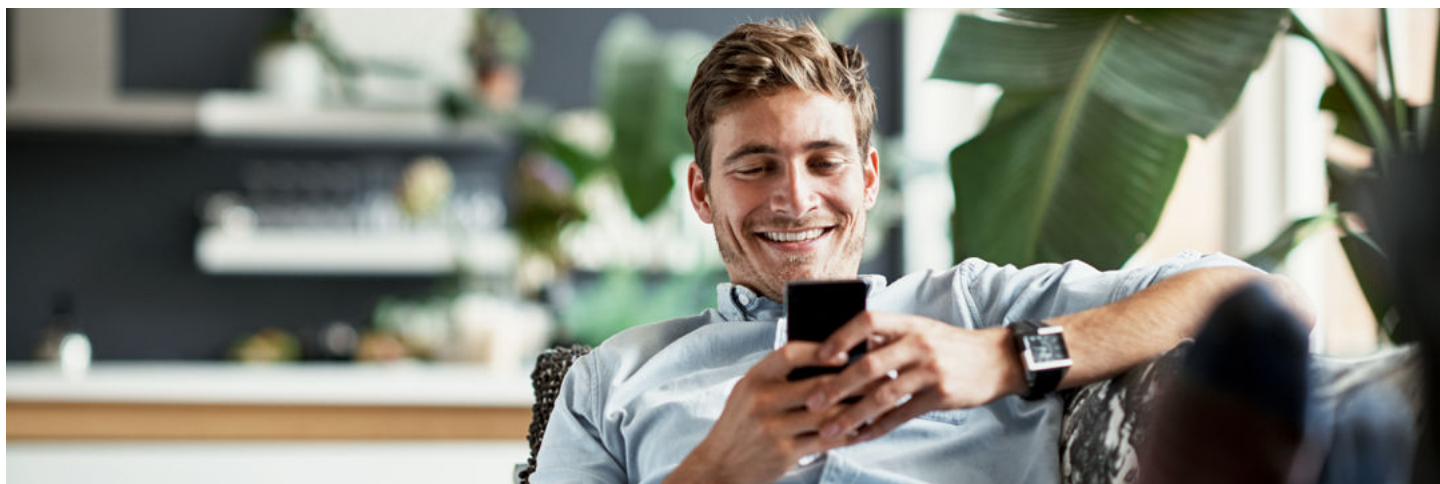
The vendor will become a caretaker of your data and brand's digital equity, so pick a partner that takes security seriously. Ensuring customer data is secure builds trust in your brand, so ask these pointed questions!

- What are your security policies?
- How do you handle data residency and sovereignty across regions? Where are your data centers hosted?
- What data security measures are in place?
- How do you enable secure user management and application access?
- What certifications have you completed (e.g. ISO 27001)?
- How do you ensure new innovations meet industry security and compliance standards?
- What privacy and permission compliance mechanisms do you offer?
- What laws and policies do you comply with (GDPR, IDFA, CCPA, BDSG, etc.)?
- How do you ensure the ethical and responsible use of AI within your solution?

## Integration

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

- What integration points do you offer (i.e. the types of systems you most commonly integrate with)?
- How do you support open APIs and custom development?
- What type of data are you able to integrate for personalization or activation, and how is this done?
- How quickly can we act on the data brought into the system?
- Describe your partner ecosystem (including tech and solution partners).
- How do you make your system data extensible to other applications (e.g. databases, business intelligence tools, etc.)?



## Personalization and Execution

### Content

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

- What does the content creation process look like in your platform?
- How personalized are product recommendations and what are the capabilities?
- How does your solution enable personalization (code-based, tokens, etc.) across channels?
- What data sources can be integrated for personalization, and which channels are supported?
- What content management features do you support for global operations (e.g. templated, asset sharing)?
- How do you handle content translations and localization?
- How can you tailor personalization logic for complex personalization requirements?
- What methods are available for a user to create and optimize content in the UI?
- Is a digital asset management (DAM) system included as part of the content experience?
- What type of content formats are supported?
- How do you integrate external content from systems like a customer management system (CMS), and what partnerships do you have?
- Can you personalize content in real time based on a customer's behavior?
- What content media storage is available? What are your storage restrictions?
- What content customizations can marketers make to templates, fonts, etc., and how does the process work?



## Channels

Channel capabilities are at the heart of customer engagement. Channels impact whether you provide a meaningful customer experience or a disconnected series of interactions. Ask about the different types of customer journeys you can deliver with their technology.



### Omnichannel Execution

- What marketing and engagement channels do you support?
- Which channels are offered natively within the solution? Which are offered through integrations with partners?
- Describe the process around sending both transactional and promotional messages.
- How does your platform build a unified view of the customer?
- What device-targeting capabilities are available?
- What marketing automation capabilities does your solution offer to orchestrate channel engagements?
- Can users create their own templates within the platform? Please describe.
- How does your platform connect with third-party systems?
- What AI capabilities do you have to support campaign management and execution?
- How does your solution connect online and offline experiences?
- How do you enable marketers to optimize campaign send times and distribution channels?
- How can marketers interact with ongoing campaigns or automations?
- What non-digital and/or non-marketing channels does your solution support or integrate with?



### Email

- Describe your email campaign creation functionality and include the steps for a user to create and launch email.
- What types of dynamic content and personalization capabilities are available for email?
- How many personalization variables are available for dynamic content?
- Does your email platform support rich media?
- What type of templates does your email builder support?
- How can users preview and test email messages across different email clients and devices?

- How does your platform support adding products from a catalog into an email campaign?
- Please describe how a user update multiple campaigns without changing each one individually.
- How does your platform support voucher or coupon personalization within email campaigns?
- What AI capabilities are available for email?
- Please describe how you scale email content to other channels.
- How are email campaigns tracked and reported in your solution?
- How does your solution support email deliverability and list health (e.g. IP warming, monitoring)?



## Web

- Describe your web campaign creation functionality and the steps to create and launch a web campaign.
- Describe your platform's capabilities for website personalization, including what level of IT involvement is required for implementation.
- What types of dynamic content are supported when targeting segments groups (e.g. pop-ups, ribbons, swapping generic website content for targeted content)?
- How does your solution detect exit intent or abandonment behavior, and what tools are available to respond to these actions?
- How does your solution suppress specific content for segments?
- How is customer behavior tracked and what tools are used for analytics?
- What strategies can be deployed to grow revenue through web recommendations?
- What AI capabilities exist for web personalization and optimization?
- Describe how your solution connects web experiences with other channel engagements for multichannel customer journeys.



## Social and Digital Ads

- Describe your ad-creation functionality and the steps for a user to create and launch an ad campaign.
- What social media and digital ad platforms can be integrated?
- How does your platform enable activation of first-party data across ad channels?
- What type of segmentation can you use to target on social media?

- How does your solution support targeting on social media platforms and other ad channels?
- How does the solution support using digital ads within an automation program?
- How does your platform support suppression strategies to optimize ad spend?
- What AI capabilities exist for digital ad targeting and optimization?
- How do you coordinate digital ad campaigns with other marketing channels and activities?
- What reporting capabilities does your platform offer on social media and digital ad performance?



## Mobile Channels

- Describe your SMS, push, and mobile app campaign creation functionality and the steps for a user to create and launch a mobile campaign.
- What types of dynamic content and personalization capabilities are available for mobile?
- What AI capabilities exist for mobile channels?
- What mobile development frameworks does your Mobile Software Development Kit (SDK) support?
- How do you ensure the SDK integration without compromising security integrity?
- Provide examples of how mobile engagements be triggered in real time based on customer behavior or geolocation.
- How are mobile channels and campaigns tracked and reported in your solution?
- What partners can be integrated to extend mobile use cases and impact?
- **Mobile App**
  - How is customer behavior within the mobile app tracked and used to trigger personalized messages?
  - Can your platform consume app data whether it's via FTP or real-time API?
  - What type of mobile app experiences and messages does your solution support?
  - Can your solution support integrations with multiple mobile apps?
  - What type of mobile app personalization is available?
  - How long does it take to implement mobile app messaging and personalization and realize value?
- **SMS**
  - How does your solution support SMS marketing?
  - What SMS providers do you work (integrate) with? Can we use our own preferred provider if they are not listed?
  - Does your SMS channel support two-way conversations?

- What type of SMS messages can be sent using your solution (e.g. promotional, transactional, bi-directional)?
- What type of SMS personalization is available?
- Can your solution support SMS from multiple numbers?
- How long does it take to implement SMS and realize value?
- **Conversational**
  - Which conversational channels do you support (e.g. WhatsApp, Facebook Messenger, Viber, LINE, etc.)?
  - What types of messages does your conversational channel solution support?
  - Does your conversational channel support two-way conversations?
  - Can you create automated messaging flows across conversational channels?
  - What personalization can be applied to conversational messaging?
  - How can conversational messaging drive personalization?
- **Mobile Wallet**
  - Which mobile wallets does your solution integrate with?
  - How does your solution support Mobile Wallet passes and vouchers?
  - What channels can Mobile Wallet passes be distributed across?
  - What personalization can be applied to Mobile Wallet passes and campaigns?
  - How long does it take to implement Mobile Wallet and realize value?



## Deliverability

Content needs to land where you want it, how you want it, and drive the actions you intended. Make sure your vendor is equipped to help make sure that happens every time.

- What pre-send validation checks are available before launching a campaign?
- What guardrails are in place to ensure content is sent to the intended audience?
- Please list all partnership certifications (e.g. CSA, Return Path).
- What metrics and tools are used to monitor deliverability performance?
- What authentication protocols (e.g. SPF, DKIM, DMARC) and infrastructure are used to support deliverability?
- How do you support IP warming and ramp-up for large volume sends?
- How do you manage shared or dedicated IPs across clients?
- How do you guard clients against IP range blocking?
- How do you detect and respond to blacklist events?
- How does your platform support one-click unsubscribes?
- What is your management process for hard/soft bounces?
- How do you help clients comply with regional regulations (e.g. GDPR, CAN-SPAM)?

## Automation and Customer Lifecycle

Ask probing questions about what automation is possible, what you can do with it, and what working with it will be like. Look into features that support management of the customer lifecycle so you can boost lifetime value.

- Describe the different types of automations that can be deployed.
- What events trigger automated marketing actions?
- How can users pause, edit, or resume running automations?
- What are your capabilities for automated A/B testing?
- How can a user preview dynamic personalization before a send?
- What pre-built, pre-populated automated campaigns do you support?
- Describe how real-time engagement or channel performance signals trigger or influence automations.
- Describe the steps for creating an automation/customer journey. Is coding required?
- Describe the steps to change or optimize this automation once it's live.
- How much guidance does your system provide in campaign creation?
- What channels are available inside of a single automation?

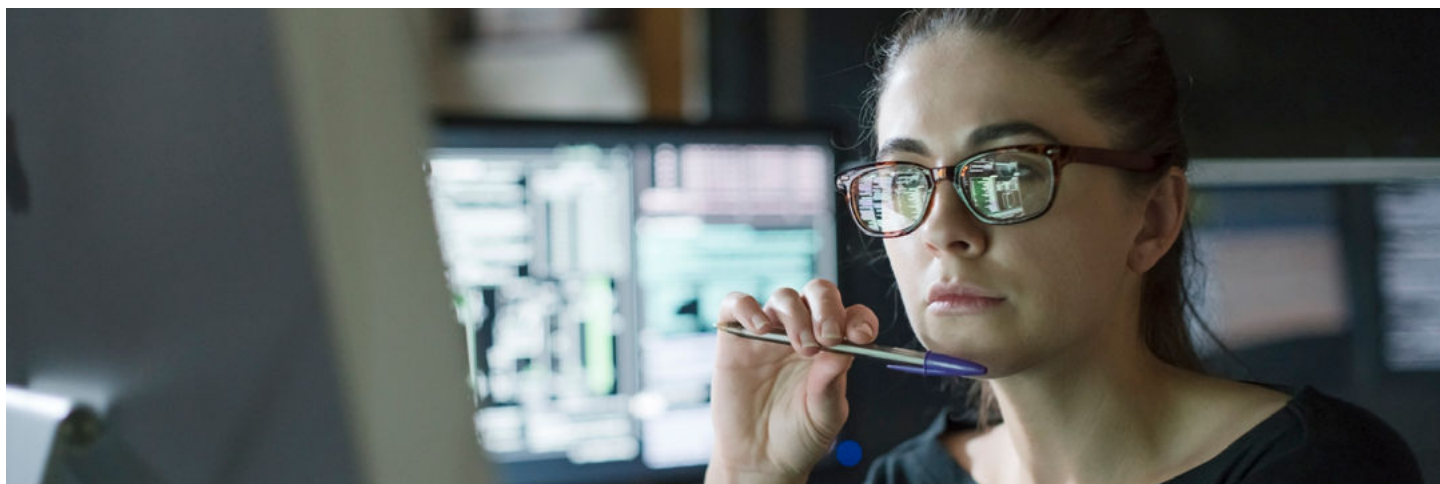


- What channel partner integrations (e.g. advertising partners, messaging providers) are supported inside of a single automation?
- What are the limits to the number of automations that can run simultaneously?
- How quickly can omnichannel automations be deployed? Describe the steps involved.
- How can users customize automations based on individual customers' preferences and/or behaviors?
- What customer lifecycle options are available?
- What churn or defecting propensity models are available?
- What ROI and predictive spend models are available?
- What segmentation capabilities are supported, and are segments dynamic or static?

## Loyalty

Top performing marketers use data to understand their most loyal customers. You need a solution that helps you identify the right experiences, channels, and personalization tactics to drive the highest conversion.

- Describe any loyalty module available natively within the platform.
- How do you support loyalty voucher management (i.e. redeem vouchers for points)?  
How many voucher pools can be created?
- Can loyalty assets be distributed via mobile wallet? What types of assets can be used (e.g. coupons, loyalty cards, passes)?
- Describe the companies and processes you use to integrate with any loyalty solution partners.
- How accessible is loyalty data, and how can it be used across segmentation, personalization, or automation?
- Describe the loyalty marketing platform gamification functionality.
- What are the reporting and analytics capabilities for the loyalty module?
- How do you support tier-based loyalty, and can tiers be used in personalization efforts?
- Can customer service award points or make manual adjustments via a front-end solution?
- How can loyalty actions (e.g. redeeming a reward) trigger marketing automations?



## Analytics and Support

### Analytics

Analytics and reporting keep marketing on target, so you need to understand the vendor's capabilities. Ask what datasets and aspects of marketing performance are measurable. Look into how the tech surfaces the data-driven insights and reports that help ensure you're aligned with overall business objectives.

- Describe available standard reports (e.g. campaign-level, automation-level, customer lifecycle, revenue attribution, and AI prediction accuracy reports).
- How are insights visualized within the solution? What types of dashboards are available?
- What options are available for custom reporting?
- Can we measure the performance of individual links/assets within any given email?
- Which touchpoints are available for measurement and reporting? Can reports surface insights from physical stores?
- How are campaign metrics tied to business outcomes?
- How does the solution measure the actual revenue impact of marketing campaigns?
- Describe how data insights surfaced in the platform can be used to power automations.
- How can aspects of reporting be tailored to my specific industry?
- What options do you have for managing and reporting across multiple accounts and/or multiple regions? Do you offer unified reporting?
- What methods do you use to connect platform data with third-party BI and Visualization tools?
- Does your system differentiate between unique clicks and gross clicks?
- How does your solution leverage AI to streamline and enhance reporting?

## Services and Support

When investing in a tool, you need to know what it takes to master the technology. Ask about the support you can expect from onboarding to training. Collect details about any add-on services to expand operational capacity.

- Describe your onboarding process. Is onboarding outsourced or provided in-house?
- Do you offer recurring campaign services?
- Do you offer strategic consultancy?
- Do you offer consultancy around best practices for omnichannel designs?
- Is there a designated technical adoption team?
- What support channels (phone, web, etc.) are available?
- Is 24/7 support available?
- What are your support SLAs?
- How do you execute account reviews? Are these monthly, quarterly, or annually?
- What level of account management is provided? What does this entail?
- How many clients, on average, does an account manager handle?
- Please describe procedures for new releases.



### TIP

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





## Running an RFP

Managing your RFP is just as important as writing it.

The RFP launches 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 your needs and the vendor landscape.

### Requirements:

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

### Invite process:

Invite about 6–8 vendors to your RFP. Develop a case for how each can help your business. Research the vendor landscape before the RFP process begins, so you have a good baseline.

### The vendor landscape:

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



**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

One of the most common mistakes is underestimating how long an RFP will take to complete.

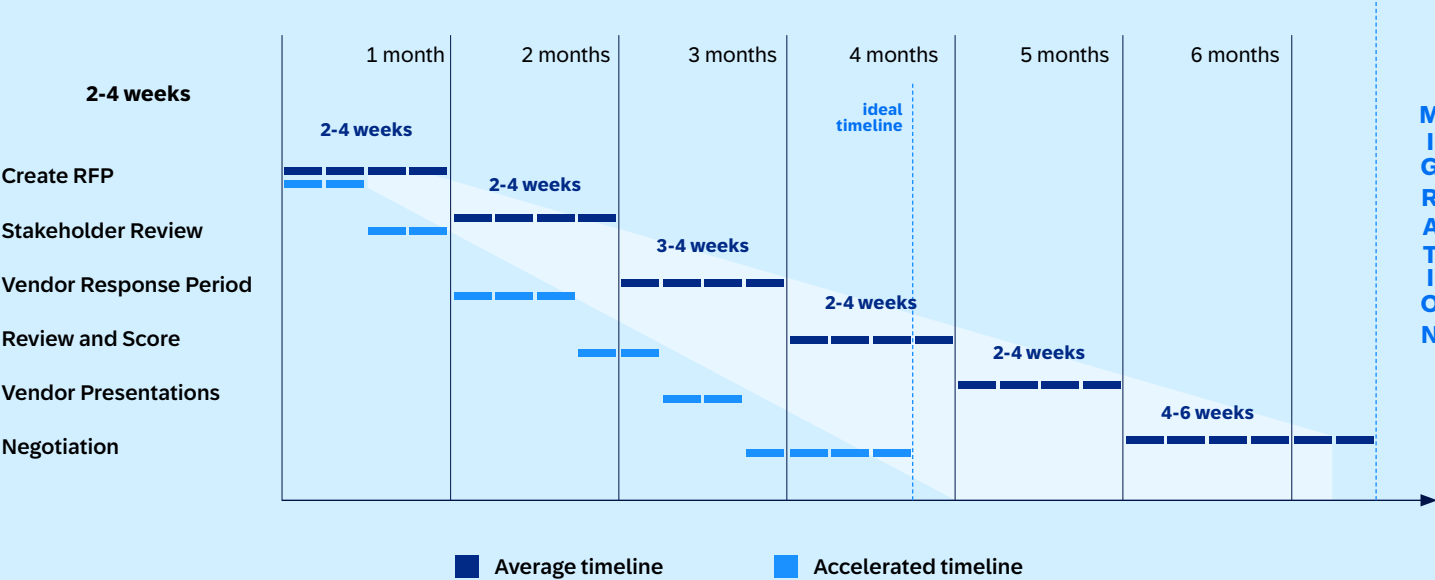
Your timeline will be unique to your business. In particular, the time to migrate can vary greatly. The more vendors you invite to the RFP, the more time you'll need for presentations and reviews.

**Remember:** An RFP will always take longer than you expect, so plan for it to run long! As a general rule, after you estimate your timeline, you should double it.

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 current contract for the notice period for your renewal.

**WARNING!** Avoid starting your RFP process if you are six months or less away from your current contract expiring. And don't forget that migration takes weeks or even months, too, depending on the vendor's implementation process!

## A General Timeline for the RFP Process





## General RFP Management

These final tips can help you better manage the RFP process.

**Only ask questions that map to your ideal business outcomes.** Sometimes, less is more. Keep in mind, you have to read, compare, and score every question that you ask.

**Give yourself enough time.** It bears repeating: marketers rarely give themselves enough time for the full RFP process, so start early.

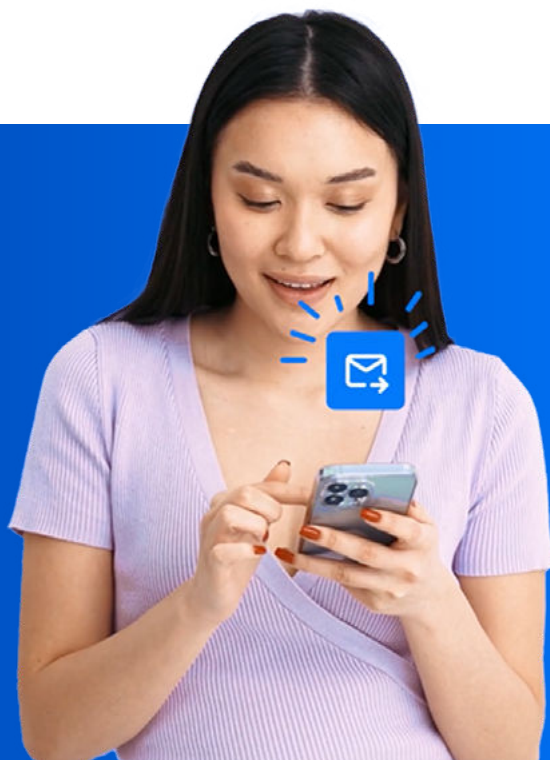
**Negotiate a contract extension with your vendor before starting the RFP.** If your current vendor doesn't win the RFP, but you run out of time to complete the process and migrate, you could end up in a bind. Negotiate with your current provider while you still have some leverage.

**Use a scorecard.** Get input from all key stakeholders to ensure an objective decision process. A spreadsheet or platform from your Procurement team can help you get started. Use scorecards to review both written responses and live presentations. Scorecards provide a historical record. If any leaders question the vendor's selection later, scorecards make the reasons for the decision clear and help remove bias.

**Make a final decision.** This seems obvious, but many RFPs don't end in a decision. People get busy or distracted. Make this step a priority and keep your eye on the prize by a certain deadline — better martech means better outcomes, and ultimately more revenue!

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