

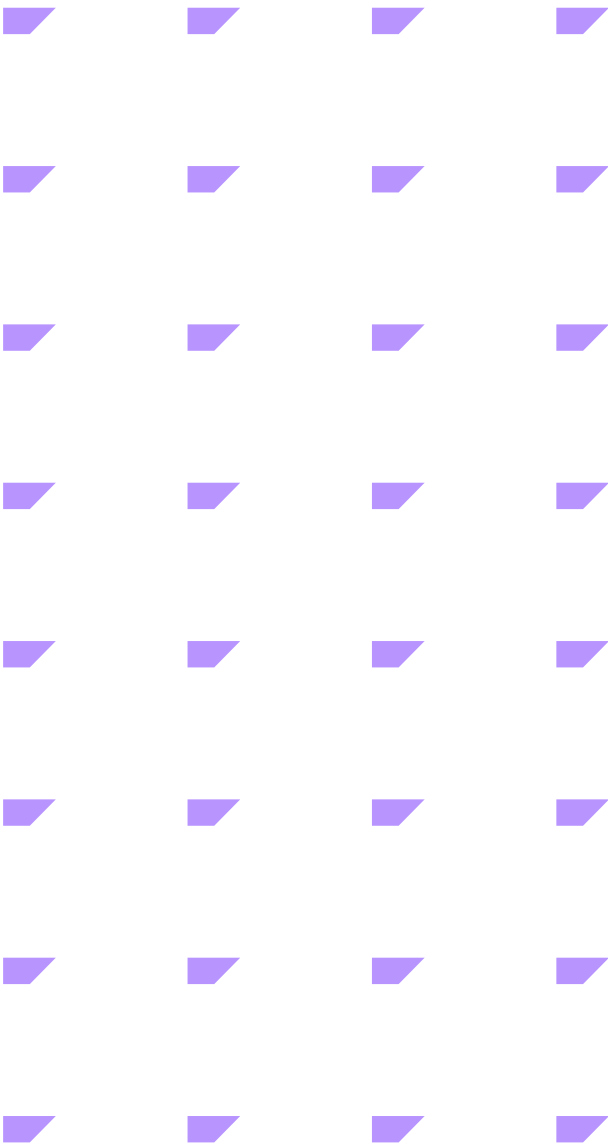
2027 Martech RFP Guide: Build a better proposal for better revenue



**AI
meets
RFPs!**

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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 engagement platform (CEP), customer data (CDP), or 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, how you can access it, and how the solution supports governance and compliance.

Use AI throughout the process.

Increase efficiency and gain invaluable insights as you research vendors, refine the draft, compare answers, score responses, and more.

Look for an innovative, AI-first partner.

Pay close attention to how vendors respond to questions about innovation, AI, and their roadmap so you understand their long-term vision.

Involve your stakeholders.

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

Request visual resources and a personalized demo.

Request diagrams and get that demo to see the solution in action! Ask how others in your industry are using the tool.

RFP Don'ts

Ask only yes/no questions.

Instead, the majority of questions should encourage vendors to share their experiences and provide thoughtful, detailed insight.

Leave everything to AI.

Double-check your process. If AI makes all the major decisions about vendors, questions, scores, rankings, or even the final selection, then your human stakeholders are too far out of the loop. Everyone involved has a responsibility to make informed decisions.

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.



TIP

Ask for supporting images, such as diagrams of the infrastructure, examples of 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.

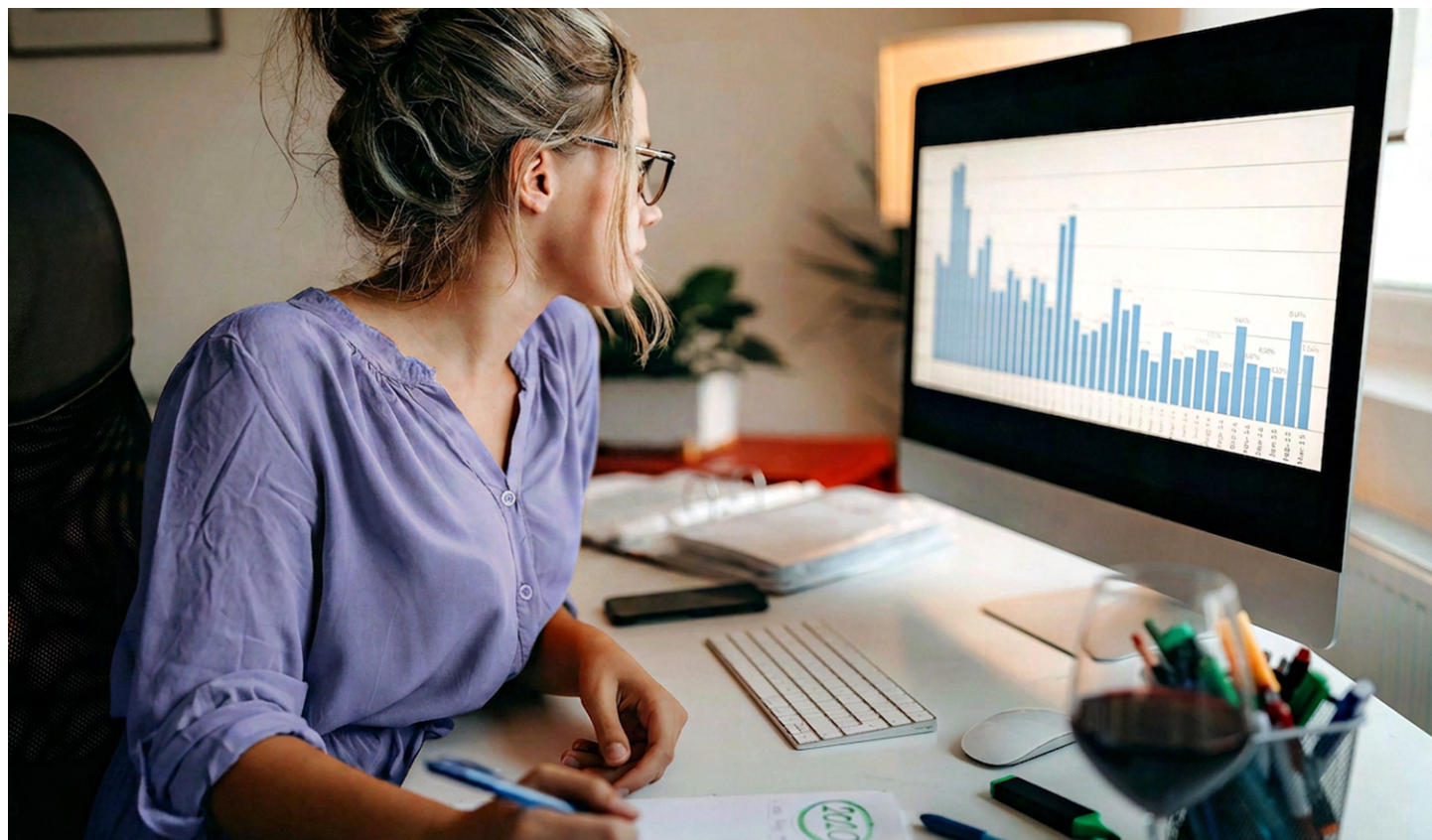
- When was your company established?
- What geographies/regions do you support?
- What industries do you work with?
- What market segments do you work with?
- What sets you apart from your top competitors?
- What are the core competencies of your marketing solution?

Product innovation

Tech evolves at an incredibly rapid pace. Ask questions that will uncover how the vendor keeps up with industry trends.

- What percentage of revenue is allocated to research and development?
- What is your process for adding emerging or related technologies to your product suite?
- How do you prioritize new features and innovations in your product roadmap?
- What's scheduled on the product roadmap for the next year, and how do customers access it?
- What does the product update/release schedule look like? How frequent are releases?
- What programs are in place to inform customers of product updates?
What communication methods are used?
- How do you enable users to provide direct product feedback (e.g. advisory boards, user communities)?
- How have customer suggestions led to significant product changes or new features?
- What is your AI product strategy? What use cases does your solution support today, and what is on the roadmap?
- What data sources does your AI have access to? How do you ensure the full business context is considered?
- How does your platform help marketers adopt advanced analytics and AI?
How reliant are marketers on data-science teams?





Data and Infrastructure

Data management and 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 systems do you integrate with (e.g. CRM, Commerce, Loyalty, CDP, ERP)?
- How do you make your system data extensible to other applications (e.g. databases, business intelligence tools)?
- What is your API strategy, and what open APIs do you support?
- What types of data are you able to integrate for personalization or activation, and how is this done?
- How do you support the creation and maintenance of a unified customer profile across multiple data sources?
- How quickly can we act on the data brought into the system?
- How does your system handle real-time data ingestion and activation?
- What data sources can be activated natively versus requiring third-party integrations?
- How does your solution support custom development or customization of capabilities, including AI models, agents, or skills?
- Describe your partner ecosystem, including technology and solution partners you integrate with.

Infrastructure

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

- Do you own your sending infrastructure or use white-labeled third-party tools?
- Do you have a client-facing system availability and performance tool that can be viewed?
- 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.).
- What languages can your system UI translate?
- How does your solution scale to handle traffic during peak business seasons?

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.

- What are your security policies?
- Where are your data centers hosted? How do you handle data residency and sovereignty across regions?
- 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 (e.g. opt-in/out, preference centers)?
- What laws and policies do you comply with (e.g. GDPR, IDFA, CCPA, BDSG)?
- What policies and governance frameworks are in place for AI capabilities?
- How are AI innovations developed with compliance and security in mind?
- What can your autonomous AI agents decide and act on without human approval?
- How do you ensure AI transparency and explainability? What can a marketer see when an agent or model takes an action?



Personalization and Execution

Content

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

- What does the content creation and optimization process look like in your solution? Include AI capabilities as well as controls that are in place to ensure brand compliance and human oversight.
- How does your solution enable personalization (e.g. code-based, tokens) across channels based on customer attributes and real-time behavior?
- How can you tailor personalization logic for complex personalization requirements? Can marketers make customizations to templates, fonts, etc., and how does the process work?
- What product recommendation capabilities are supported, and how personalized are product recommendations?
- How is content media created, managed, and stored as part of the solution, and are there any storage requirements?
- What content management features do you support for global operations (e.g. brand templates, asset sharing, asset tagging)?
- How do you handle content translations and localization?

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, and which are offered through integrations with partners?
- How does your solution connect online and offline experiences?
- Describe the process for sending both transactional and promotional messages.
- Describe how your solution can target customers based on their profile and channel interactions (e.g. device type, channel preference)?
- What marketing automation capabilities does your solution offer to orchestrate and optimize channel engagements?
- Describe how AI is used to create, automate, activate, and optimize campaigns across single or multiple channels.
- How can marketers interact with ongoing campaigns or automations?
- How does your solution support lifecycle engagements beyond traditional marketing channels (e.g. sales engagements, support responses, fulfillment updates)?



Email

- Describe your email campaign creation functionality and include the steps for a user to create and launch email.
- Describe how AI is used to create and optimize email campaigns and content.
- What dynamic content and personalization capabilities are available for email, and how does it handle complex personalization at scale?
- What rich media and template types does your email builder support?
- How can users preview and test email messages across different email clients and devices?
- How does your solution support adding products from a catalog into an email campaign?
- How does your solution support bulk edits or global content updates across multiple active campaigns?
- How does your solution support voucher or coupon personalization within email campaigns?
- Describe how you scale email content to other channels.

- Describe channel-specific metrics and reporting available for email.
- 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 how AI is used to create and optimize web channel personalization, recommendations, and campaigns.
- Describe your solution's capabilities for website personalization and how it's possible for users (both technical and non-technical) to make changes?
- How does your solution support web experiences and personalization for anonymous vs identified visitors?
- What types of dynamic experiences are supported when targeting segment 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 highlight or suppress content for specific segments?
- Describe channel-specific metrics and reporting available for web.
- 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.
- Describe how AI is used to power digital ad campaigns and optimize ad spend.
- What social media and digital ad platforms can be integrated?
- How does your solution support audience segmentation and targeting on social media platforms and other ad channels?
- How does your solution enable activation of first-party data across ad channels?
- How does the solution support using digital ads within an automation program?
- How do you coordinate digital ad campaigns with other marketing channels and activities?
- How does your solution support suppression strategies to optimize ad spend?
- Describe channel-specific metrics and reporting available for this channel.



Mobile channels

- Describe your SMS, push, and mobile app campaign creation functionality, including the steps for a user to create and launch a mobile campaign.
- Describe how AI is used for mobile channels and how it supports personalization, optimization and automation?
- How does your solution manage mobile opt-in, opt-out, and compliance across different regional regulations such as GDPR?
- What dynamic content and personalization capabilities are available across mobile channels?
- What mobile development frameworks does your Mobile Software Development Kit (SDK) support and how does it comply with security standards?
- Provide examples of how mobile engagements be triggered in real time based on customer behavior, geolocation, or other live signals (e.g. weather).
- How are mobile channels and campaigns tracked and reported in your solution?
- What partners can be integrated to extend mobile use cases, and how are new partner integrations certified and maintained?
- **Mobile app**
 - How does your solution consume mobile app data for segmentation, personalization, and activation (e.g. FTP, API)?
 - What customer behavior within the mobile app is tracked and used to trigger personalized messages?
 - What type of mobile app experiences and personalization does your solution support (e.g. push notifications, in-app modal, inline message, inbox)?
 - Describe how your solution supports integrations with multiple mobile apps.
 - How long does it take to implement mobile app messaging and personalization to realize value?
- **SMS**
 - How does your solution support SMS marketing (e.g. one-way push to subscriber, bi-directional, conversational)?
 - What SMS providers do you work (integrate) with, and can customers bring their own preferred provider if they are not listed?
 - What type of personalization can be applied to SMS campaigns?
 - How does 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, RCS)?
- What types of messages does your conversational solution support, and what personalization can be applied?
- How does your conversational channel solution support two-way conversations?
- How are conversational messaging campaigns able to interact with other channel campaigns and automations?
- How does your conversational channel solution work with non-marketing systems (e.g. CRM, Support Center) for lifecycle engagement use cases (e.g. customer support handoff)?
- Describe channel-specific metrics and reporting available for the conversational channel.

- **Mobile wallet**

- Which mobile wallets does your solution integrate with (e.g. Apple Wallet, Google Wallet)?
- How does your solution support Mobile Wallet passes and vouchers?
- What channels can Mobile Wallet passes be distributed on?
- 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 deliver.

- What pre-send validation, testing, and audience safeguards are available before launching a campaign?
- Please list all partnership certifications (e.g. CSA, Return Path).
- What metrics, reporting, 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 solution support one-click unsubscribes?
- What is your management process for hard and 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 and the steps to create them. How quickly can they be deployed?
- Describe how native AI tools support creation and optimization for audience identification, segmentation, orchestrated campaigns, and activation.
- What segmentation capabilities are supported? Are segments dynamic or static?
- What customer lifecycle models are available (e.g. Recency/Frequency, Churn propensity, Predictive Spend)?
- What events can trigger automated marketing actions (e.g. real-time behavior, channel engagement/performance)?
- How can users customize automations based on individual customers' preferences and/or behaviors?
- 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?
- How does the solution provide users with templates, inspiration, or guidance for campaigns and automation programs?

- What channels are available to use as part of an automation program?
- What channel partner integrations (e.g. advertising partners, messaging providers) are supported as part of an automation program?
- What are the limits to the number of automations that can run simultaneously?

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 how your solution supports customer brand loyalty engagements that nurture, convert, retain, and grow customer lifetime value.
- How does your solution support or integrate with customer loyalty management platforms?
- Describe the companies and processes you use to integrate with any loyalty solution partners. How are you able to support businesses with multiple brands, business units, and languages as part of the same loyalty platform or program?
- Describe how you support loyalty programs with partner or affiliate alliances.
- How are loyalty rewards and profiles integrated with in-store and point-of-sale (POS) transactions?
- Describe how AI is used to power engagements that drive loyalty and augment loyalty programs (e.g. identify high value segments, tailor content and offers based on spend / status).
- 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)?
- How accessible is loyalty data, and how can it be used across segmentation, personalization, or automation?
- Describe the loyalty marketing solution gamification functionality.
- Describe channel-specific metrics and reporting available for this channel. How can financial systems data be used to optimize offers and spend?
- How do you support tier-based loyalty, and can tiers be used to personalize content?
- 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?
- Can household or family accounts be linked to share or pool loyalty benefits? How are relationship hierarchies managed?
- How does your solution handle consent management and privacy preferences in compliance with regulations (e.g. GDPR, CCPA)? Is consent captured and auditable at the loyalty event level?



Analytics and Support

Analytics

Analytics and reports enable marketers to prove impact and uncover actionable insights, so be sure to 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/event attribution, AI prediction accuracy reports).
- How are insights visualized within the solution? What types of dashboards are available?
- What options are available for custom reporting beyond standard reports and dashboards?
- How does your solution enable using AI to streamline, generate, and enhance reporting?
- Describe how users can view engagement and revenue performance by audience, campaign, channel, and content/offer within the solution.
- Which touchpoints are available for measurement and reporting? How can offline marketing touchpoints (e.g. physical stores, direct mail) be measured?
- How are campaign metrics tied to business outcomes?
- Describe how data insights surfaced in the solution can be used to power automations.
- How can aspects of reporting be tailored to my specific industry?
- How can users measure and report performance across multiple accounts and/or multiple regions?
- What methods do you use to connect solution data with third-party Business Intelligence and Visualization tools?
- Describe how you can combine marketing performance analytics with other customer experience or business operational insights (e.g. customer service incidents, financial reports, supply chain/inventory intelligence) to optimize campaign strategy.

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 and how it is managed (i.e. outsourced or provided in-house)?
- Describe available services (e.g. recurring campaign services, strategic consultancy, content, and design services).
- What strategic and/or technical teams are available to support product adoption and success?
- What support channels (phone, web, etc.) are available?
- Is 24/7 support available?
- What are your support SLAs?
- How frequently do you execute account reviews, and what do these entail?
- What level of account management is provided? What does this entail?
- How many clients, on average, does an account manager handle?

Packaging and Pricing

Although the final cost of the martech isn't everything, it certainly isn't nothing. Ensure you understand solution pricing and opportunities to maximize your ROI.

- How can I track my usage of messaging, AI, or other capacity units in real time?
- What pricing model do you use, subscription, consumption-based, tiered, or hybrid?
How does pricing scale as our usage grows?
- What is included in the base license, and what capabilities or features require add-on purchases?
- Are there separate charges for API access, data storage, or integrations with third-party platforms?
- How is AI feature usage metered and billed? Are AI credits or tokens included in standard pricing or licensed separately?
- Do you offer multi-year contract pricing, and what discounts are available for longer commitments?



TIP

After gathering questions from multiple departments, you'll likely have some repeats. Eliminating redundant questions will 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.

Your 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.



TIP

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.



Applying AI throughout the RFP Process

With recent AI advancements, teams have been able to significantly reduce time and effort required to run an RFP. Although AI can’t (and shouldn’t) make the all-important final selection for you and your company, it can help you accelerate the process through research, organization, and analysis.

Here are various ways AI can act as your assistant at different stages of the RFP:

 Preparation	• What types of data are you able to integrate for personalization or activation, and how is this done? • How do you support the creation and maintenance of a unified customer profile across multiple data sources? • How quickly can we act on the data brought into the system? • How does your system handle real-time data ingestion and activation?
 Drafting	• Convert business objectives into questions. • Eliminate redundant questions to save time on evaluation. • Improve clarity and identify potential gaps in feature coverage.
 Evaluation	• Compare vendor responses and standardize scoring inputs. • Summarize key differentiators among vendors. • Flag incomplete answers. • Recommend follow-up questions to ask in meetings or demonstrations.



TIP
AI should never replace critical thinking. Let AI handle the administrative work so your team can focus on what matters most — making an informed, objective decision that supports long-term business outcomes.



The Timeline of an RFP

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

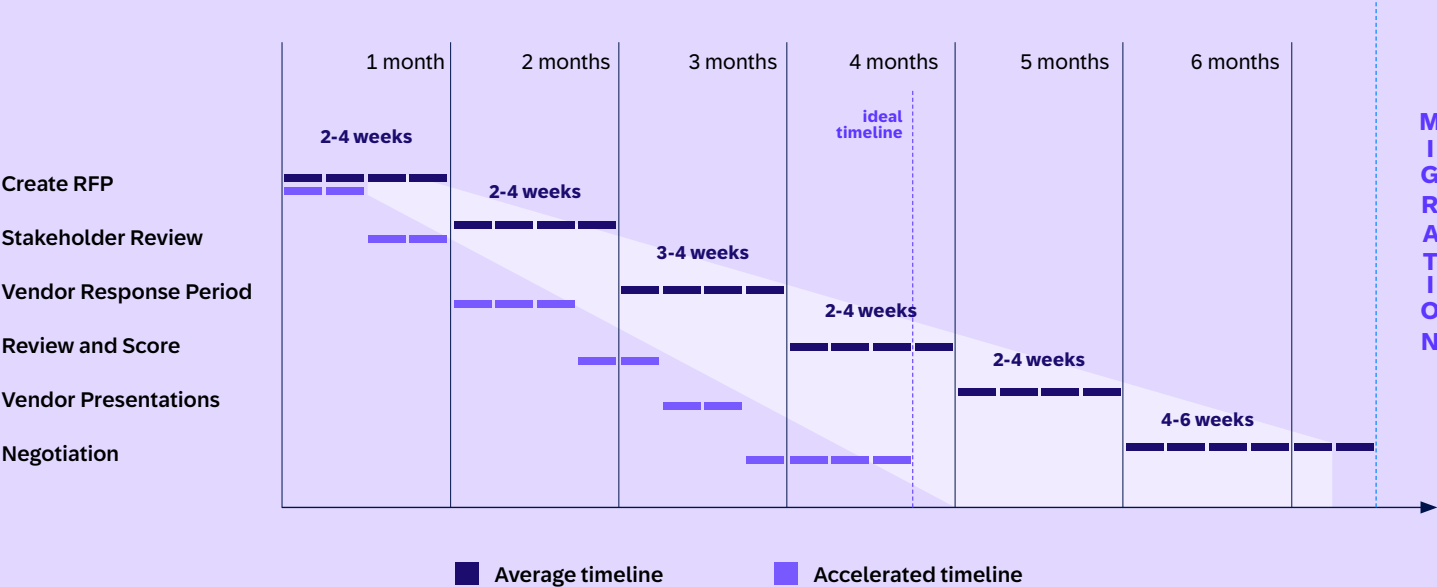
Your timeline will be unique to your business. In particular, the time to migrate can vary greatly. The more vendors you invite to the RFP, the more time you'll need for presentations and reviews.

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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SAP Engagement Cloud helps organizations power unique engagement by connecting real-time customer insights with the operational signals that run the business. As part of the SAP Customer Experience (CX) portfolio, Engagement Cloud enables personalized, AI-driven interactions across every channel—turning moments like orders, service events, and loyalty milestones into timely, relevant experiences that build trust, strengthen relationships, and drive growth. For more information, visit emarsys.com.

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