

A Marketer’s Guide to RFP Success

# Your Guide to Building a Better RFP

Selecting a partner for your digital marketing needs can be a daunting task. As the industry moves at warp-speed and technology platforms all begin to look alike, it is more important than ever to cut through the clutter and identify what truly differentiates one vendor from another in their ability to deliver long-term digital marketing success.

## The RFP Process

The Request for Proposal process is, for many organizations, the first opportunity to document their requirements for a digital marketing partner, and to gain valuable insight and information in return. Traditionally, the RFP process has been a time-intensive and often frustrating effort for global organizations. Ask the wrong questions, and you are likely to receive massive amounts of irrelevant information to sift through, costing valuable time and resources that today’s lean marketing teams simply do not have. Ask the right questions, and it is making process.

## Our Unique Position

Salesforce Marketing Cloud is uniquely positioned to help you develop a better RFP. Why? Because we participate in hundreds of RFPs a year, across all verticals and market segments. In this guide, we compile the best and most differentiating questions to consider when evaluating a potential digital marketing partner. As you will see, technology and services are just a part of the equation. It is equally important for your digital marketing partner to provide a vision and plan for execution on how they will help you achieve phenomenal business results. And while ROI is certainly an important aspect of an evaluation, we challenge and encourage you to go deeper and wider with your questioning.

## The Right Approach

So...you are probably wondering, “What is the right approach to building a better RFP?” Quite simply, it is to take a holistic look at your digital marketing needs. New considerations we encourage any global organizations to ask include:

1. What is your vision for our account, and how will you ensure we execute against that vision?
2. Will the platform flex and scale to meet our needs, or will we need to modify our needs to meet the platform?
3. How will you help decrease operational costs and services dollars on future, strategic initiatives?
4. How will you help us prioritize the campaigns that will drive better customer lifetime value?

We can be a partner to guide you through the ever-changing marketplace and the process of qualifying and selecting an interactive marketing solutions provider.

Getting the right answers from your RFP—all the information you need to know—starts with asking the right questions.

# The Right Questions for Your Request for Proposal

## Company Overview

1. Tell us about your company’s background and history. For instance, what is your ownership structure?
2. Present your company’s financials.
3. Provide biographies of your company’s executive team.
4. Describe your global presence. How do your products and services enable digital marketing for a global organization with multiple brands, geographic areas, and/or lines of business?
5. Describe your approach to thought leadership and global research. What types of research did you publish in the past year? How is it distributed? What additional offerings do you share that are above and beyond typical information-sharing?

### Collaboration on Strategy

1. What current trends do you see in digital marketing around the world?
2. Does your company offer strategic services for global organizations? If so, describe them.
3. How do you assess the current sophistication of a global digital marketing program and provide recommendations for future improvement?
4. What process or methodology do you employ to grow an organization’s program over time?
5. What can your strategic services team do for our organization?
   1. Provide an example of how you have accomplished this for a global organization and what results they achieved.
   2. Provide an example of how you quantifiably improved a client’s digital marketing program.
6. How can you help our organization increase visibility across channels and departments through our planning process? For example, can your software enable our social media team to have a view of all scheduled email sends?

### Augmentation with Current Technology

1. Provide an overview and details of your product roadmap.
2. How many major and minor product releases have you completed in the past year? Explain what they are and the effect they have on uptime, availability, and client impact.
3. Describe your capabilities for the following interaction channels:
   1. Email
   2. Mobile
   3. Social media
   4. Websites
   5. Predictive Intelligence
4. Does your technology platform rely on any third-party our outsourced company for email, mobile or social media? If so, with whom and for what?

### Integration

1. Describe your partner ecosystem. What types of partnerships do you offer? Who are they?
2. Describe the types and number of pre-built integrations you have for the following:
   1. CRM
   2. Web Analytics
   3. Content Management
   4. Ratings and Reviews
3. How many organizations have implemented your pre-built integrations? Which integrations?
4. How many clients have completed their own/customized integrations? What tools did you provide to them?
5. How do you encourage the ongoing development of third-party integrations with your platform?
6. Describe the most sophisticated integration a global organization has completed using your platform.

### API Capabilities

1. Describe the ability to get data in and out of your system via the API.
2. What is the availability of your API and how does it differ from that of your application?
3. How are upgrades and enhancements applied to your API? Could we be required to change our integration endpoints?
4. What percentage of your functionality is exposed through your API?
5. Provide a client example of the most innovative use of your API.

### Data Management

1. Does your platform utilize a centralized digital marketing subscriber database? If so, is all data stored in a single location or do some areas require data be stored separately?
2. Describe your capabilities to allow global marketers to do advanced segmentation and audience discovery on large amounts of data within your application.
3. Describe the types of data your clients typically use within segmentation and messaging.
4. Provide an example of how a current client uses relational data in your application.
5. How much data do you currently have under management and what is your largest client database?
6. What are your maximum and average hourly import and export send speeds?
7. What are your maximum and average data transfer rates?
8. Please provide your standard product service-level agreement.

### Archiving and Security

1. How many data centers do you maintain? What are their locations and capacities?
2. Describe your data backup policies and procedures. What is your policy for archiving campaign data? How long is data stored?
3. If we need to pull data from the archives, what is the procedure? Is there a charge to access archived data?
4. What security protocols and measures are in place for data backup and archiving?
5. How many times during the past calendar year has your application been unavailable due to maintenance or upgrades?
6. What is your contingency plan to prevent service disruptions, including your disaster recovery plan? What is your current estimated recovery time should an incident occur?
7. Have you had any data breaches in the last 24 months? If so, please explain.
8. How do you handle personal identification information? Do you have the ability to send emails without storing email addresses on the system?
9. Describe the system security audit/testing process for your organization. Include the latest report from any independent organization that audits your company.
10. What are you proactively doing to keep your enterprise clients’ data secure? How do you work with them to ensure your system meets their auditing and security requirements?

### Email

1. How can your technology help us improve the relevancy of our global messages?
2. How can you help us streamline our digital marketing content management?
3. What types of tools do you provide to produce and manage sophisticated content in your application?
4. Describe your capabilities to control and/or optimize the performance of an email after it has been sent.
5. Describe how your technology allows subscribers to manage their digital marketing preferences. How do you manage this across multiple brands, regions, and/or lines of business within a global organization?

### Automation

1. Describe how your product enables automated digital marketing.
2. Provide an example of how you have helped a global organization drive operational efficiencies.
3. Describe the process to modify an automation after it has begun within your product.
4. How many automated programs have been executed on your platform over the last 12 months? Do you charge for these automations on an ongoing basis?
5. Describe the most sophisticated automated drip campaign that a client is currently conducting on your platform. How was this program initiated and what process would they implement to change it?

### Reporting

1. How can you tailor reports to our specific business needs? What are the most complex, sophisticated reporting requirements that a global organization has requested from you?
   1. Provide an example of a report tailored to specific business needs.
2. Does your system create a single view of the subscriber and provide details on how the subscriber interacted with messages and through various channels (email, mobile, social media, etc.)? Describe your capabilities to report on an individual’s subscriber engagement over time.

### List Growth

1. Describe your ability to assist us to grow our email subscriber lists organically and across multiple channels, as well as improve email performance.
   1. Provide relevant examples of how you assisted a client in growing their list while maintaining permission and deliverability best practices.
2. Describe your ability to help us re-engage and reactivate dormant subscribers.
   1. Provide an example of a client and what types of results they achieved.

### Development of Interactions

1. What types of tactics do you implement with clients to improve their return on investment? How will your solution increase our ROI?
2. Where do your clients see the most value out of your solution?
3. How will you help us quantify and prioritize digital marketing opportunities that exist within our business?
4. What do you see as the future of digital marketing?
5. How does your solution enable digital marketing across a global organization?

### Supplementary Operations

1. How do you proactively manage relationships with the top ISPs?
2. What deliverability certification tools or solutions do you offer? What deliverability partnerships do you maintain?
3. Describe your opt-out management process and how it is automated through multiple levels of the organization and multiple messaging channels.
4. How do you prevent email domains from being black-listed and blocked as SPAM from all ISP/email providers?
5. How large is your in-house, full-time deliverability team?
6. Provide an example of an organization that experienced significant deliverability problems and how you helped them remedy the situation and in what timeframe.

### Services

1. Describe the process for implementing a new client account and the training you provide to onboard global organizations with multiple brands, geographic areas, and/or lines of business.
2. How many implementations did your services team complete last year? Describe the most complex implementation you completed in the past year.
3. How many global organizations do you provide full-service campaign deployment for? Describe the most sophisticated campaign deployment that you are currently conducting on behalf of an organization.
4. Explain your approach to professional services and identify how clients can access a full suite of services on a full-time or as-needed basis.
5. As we become more relevant and sophisticated in our digital marketing communications, how do you help us manage our global resource utilization and budget?
6. How do you support the following service needs with your solution?
   1. Full-Service Campaign Deployment
   2. Collaborative Services Model
   3. Self-Service Model
7. Provide an example of how you started a client in full-service and successfully moved them to collaborative or self-service. What tactics did you use and how long did the transition take?
8. How do you handle account management? Do you provide direct access to the service personnel working on our account?
9. Provide an example of your standard service level agreement for campaign deployment and technical support.
10. How do you handle modifications or customizations of the SLA to meet our business needs (i.e., rush requests)? Is there an additional charge for those items?
11. Describe your levels of technical support. How do you provide technical support and trouble-shooting to global client?
12. Do you provide clients with access to training, documentation, and client support? Do you offer complimentary client educational opportunities on market trends and best practices?

### Mobile

1. Provide an overview and details of your mobile offering.
2. What type of SMS programs do marketers typically run using your mobile platform?
3. How can your mobile technology help us improve the relevancy of our global messages?
4. Can you share how clients have used your software for:
   1. Personalization
   2. Segmentation
   3. Short-code/keyword management
   4. Planning and testing SMS programs
5. What types of tools do you provide to produce and manage sophisticated content in your application?
6. How does your platform connect with each of the mobile carriers—are some direct and others accessed indirectly via an aggregator?
7. What information are you able to get from the mobile carriers? For example, are you able to retrieve data such as time of message delivery, opens and click-through rates?
8. Do you have a standard/recommended set of processes/filters to help ensure your clients achieve high rates of message deliverability?
9. Do you have standard SLA’s for availability of the mobile platform or access to mobile carrier networks?
10. What is your typical message send speed or throughput rate? Can this be adjusted for us?
11. How do you encourage the ongoing development of third-party aggregator integrations with your platform?
12. Are you open to transferring short codes from one aggregator to the other?
13. What type of tracking and reporting capabilities do you offer? What type of data can you help us track? Can you give us examples of these reports?
14. How can you tailor reports to our specific business needs?
15. Does your system create a single view of the subscriber and provide details of how they interact with messages through multiple channels (email, mobile, social media, etc.)?
16. Describe your capabilities to report on an individual’s subscriber engagement over time.
17. Please provide whitepapers, case studies, or examples of your current clients, showing how you improved their programs.
18. How can you help us ensure that our SMS program is MMA compliant? Are there any specific opt-in best practices (within the MMA guidelines) that you have found to be most important in maintaining relationships with mobile customers and operators?

### Social Media

1. Explain the technology solutions you provide across each of the following areas: social listening, presences, customer engagement and conversations, ads, measurement and insights, and CRM integration.

***Social Listening***

1. Provide a brief overview of your social listening solution.
2. What social media sources do you cover?
3. How often are new social media sources added?
4. Detail your level of partnership with Twitter, Facebook and any third-party providers.
5. Explain how the platform filters social media content.
6. How much historical data is included? Does your solution archive data indefinitely?
7. Which languages can we track using the solution?
8. Describe your solution for identifying and tracking influencers.
9. Describe your solution’s sentiment analysis capabilities.
10. Describe how data can be sorted, tagged, categorized, and routed by users.
11. How can the platform help us track and compare our brands? What types of data can you capture for competitors?
12. Explain how your solution provides insight and actionable data beyond the standard metrics.
13. Describe your reporting and alert capabilities.
14. Does your platform have an open API?
15. Do you offer integration with third-party providers?
16. How does your solution connect customers’ social data with traditional CRM data?
17. Explain your enhanced analytics and consultative capabilities beyond what is included in your standard analytics package.

***Conversation Management and Engagement***

1. Outline your conversation management technology.
2. Explain how your conversation management solution allows multiple community managers to moderate and react in real-time. Outline how your streams can be customized to each user.
3. Give details on your ability to publish and schedule content to social applications such as Twitter, YouTube and Facebook.
4. Outline the controls that exist for publishing, authoring and moderation.
5. Outline your process for approval and in-suite notification functions in regard to internal communications, prioritization and post classification.
6. Describe how non-suite users can approve or review content.
7. Do you offer link shortening capabilities?
8. Do you provide a repository for frequently-used content?

***Tracking and Reporting***

1. What type of tracking and reporting capabilities do you offer? What type of data can you help us track? Can you give us examples of these reports?
2. Outline details on the types of social actions that your technology tracks as it relates to conversions.
3. Describe your analytics reporting capabilities.

### Overall Pricing

1. Describe your pricing structure and provide complete pricing information, including setup costs, any one-time costs, any alternative pricing, and any recurring/annual costs for a client.

# Demonstration Use Cases

### Digital Campaign Management

1. Demonstrate how your solution enables our marketers to create, manage and monitor digital marketing (Email, Mobile, Social & Web) digital campaigns.
2. Demonstrate executive insight into the campaign planning and calendaring process.
3. Demonstrate how your solution allows a marketer to support the browser and operating system of their choice, since team members or the IT department have specific preferences.
4. Demonstrate how your solution will scale with our business, both domestically and internationally.
5. Demonstrate how your solution supports both centralized and decentralized marketing organizations.
6. Demonstrate how multiple lines of business login and use the platform.
7. Demonstrate how different roles within the organization use the platform.
8. Please demonstrate the advanced security features of the platform and how users may be assigned to honor the security requirements of our business.
9. Demonstrate how user controls may be placed on exporting data or accessing the solution.
10. Demonstrate how a marketer gains access to industry best practices, product feedback, and collaboration with others within your solution.

### Campaign Analytics

1. Demonstrate how each of the following reporting abilities are available in near real-time within the user-interface, automated on a schedule or accessible via API:
   1. Real-time digital marketing campaign dashboard
   2. Email channel specific
      1. Demonstrate real-time marketing and transactional analytics.
      2. Demonstrate dynamic content reporting abilities.
      3. Analyze campaign segments for historical performance.
      4. Create a cross-tab report to understand which campaigns:
         1. Drive opens within the first eight (8) hours.
         2. AND which domains have the highest engagement.
         3. Finally, create a customized calculated report measure to better understand the high performing domains.
   3. Mobile channel specific
      1. Measure Inbound and Outbound campaign performance.
      2. Demonstrate survey response metrics.
   4. Social channel specific
      1. Measure Reach, Influence, and Engagement.
      2. Measure the outbound customer response against all Social channels.
      3. Export social communications from your solution to be leveraged within internal Business Intelligence tools.
2. Demonstrate the difference between the full-service and self-service analytics available within your solution.

**Customer Acquisition**

1. Demonstrate how a marketer may easily create a digital marketing acquisition program for the following:
   1. Email only
   2. Mobile only
   3. Social only
   4. Combined digital marketing campaigns (mobile to email, social to email, etc.)

### Conversion

1. Demonstrate how to leverage data in the platform through the following ways:
   1. Import 3 million email customer records from a secure location into your solution.
   2. Import in a Mobile only list of customers from your desktop.
   3. Add a new table to the data model.
   4. Import additional related customer data used for targeting/personalization from your desktop.
   5. Add an additional field to the customer list.
   6. Re-import the 3 million customer records, including the new field, while importing another 3 million customer record set.
   7. Demonstrate how a marketer would now index the data within your solution.
   8. Demonstrate how the platform can derive fields against raw data to allow for easier segmentation by a marketer.
2. Demonstrate how a marketer would discover, analyze, and publish new market segments against large data sets in real-time and without SQL:
3. Discover
   1. All females, 18-44.
   2. Add those living in the west.
   3. How many individuals meet the criteria?
4. Analyze new market segments where:
   1. How does a marketer save the criteria for reuse?
   2. How would a marketer segment off of data older than 6 months?

### Day-to-Day Campaign Operations

1. Create and deploy an email campaign from end to end
   1. Demonstrate the various types of dynamic content.
      1. How would your solution improve the messaging building and sending process for high volume senders?
      2. How would a marketer be able to target content based upon more than a single row of data (multiple bookings, cart abandons, etc.)?
   2. Demonstrate how content may be changed based upon rules after a campaign has been deployed (at the time of open, not at the time of send).
   3. Dynamically change the creative being shared on social networks to drive additional acquisitions.
   4. Demonstrate how we can monitor Deliverability and Reputation in your solution
   5. Demonstrate how the web version of an email campaign is created.
   6. Demonstrate the steps for tracking all links in an email campaign.
   7. Demonstrate how email campaigns will render across various email clients and devices (e.g. Gmail, AOL, iPhone, Blackberry…etc.)
   8. Demonstrate how content may be saved and reused in the future.
   9. How would this differ for global organizational content sharing?
2. Create an A/B Test for an email campaign. Demonstrate the following various A/B conditions.
   1. From
   2. Subject Line
   3. Time of Send
   4. Content Area
   5. Different Email Campaigns
   6. Demonstrate real-time A/B analytics
   7. Highlight the build steps not included in the demonstration.
3. Create a transactional campaign to be triggered via API
   1. Demonstrate how priority may be assigned to the type of transactional message.
4. Create a coordinated outbound Social update tied to the same conversion campaign as an email & a lifecycle program.

### Retention

1. Demonstrate how your solution can help monitor our brand on both primary social channels.
2. Create a three wave welcome or post-event lifecycle marketing program within your solution
   1. Modify the targeting rules for the second wave to now leverage a new data source + prior campaign/wave engagement
   2. Modify the third wave creative based on new dynamic content generated from a new data source
      1. Demonstrate how hosted version reflects creative changes
   3. Add a customer survey via Mobile based upon customer engagement.
3. Create a separate Mobile specific marketing program for those customers who have not provided an email address
   1. Demonstrate how your solution would enable marketers to enrich the customer profile, ultimately collecting the customer’s Social and Email preferences.

