SAP Emarsys

## 2025 MARTECH RFP GUIDE:

# Plan, Write & Manage a Successful Proposal

Transform your martech selection process from a big pain to a big gain

**Get 140+ sample questions!**

# What's in this guide

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

**A well-written, well-run RFP will empower you to select the martech (ESP, CDP, CX, etc.) that meets your business needs.**

Your RFP will help you compare solutions objectively and aid decision making by mapping out needs against capabilities and price.

The effectiveness of your RFP depends on the depth and insightfulness of the questions you ask and how you manage the process. Your RFP document should be a comprehensive business proposal that expresses the needs of your business.

## 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. What follows are example sections and questions to include in your RFP when looking for a new marketing technology partner.**

**TIP**

Ask for diagrams and supporting images wherever it makes sense to do so, 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?**
- **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?**

## 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?**
- **What programs enable users to provide direct product feedback?**
- **Do you have any events where new products are launched?**
- **How have customer suggestions led to significant product changes or new features?**
- **What opportunities exist for customers to participate in driving innovation?**
- **What sets you apart from your top competitors?**

# Data and Infrastructure

## Infrastructure

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

- **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.).**
- **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?**
- **Where are your data centers hosted?**
- **What data security measures are in place?**
- **What are your user roles and policies?**
- **What certifications (e.g. ISO 27001) have you completed?**
- **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 (GDPR, IDFA, CCPA, BDSG, etc.) do you comply with?**

## Integration

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

- **What integration points do you offer?**
- **What data integrations do you have?**
- **Can we quickly act on the data brought into the system?**
- **How easy is it to integrate different data points?**
- **Describe your partner ecosystem.**
- **What capabilities are there for mapping first-party and third-party audiences?**

# Personalization and Execution

## Content

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

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

## Channels

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

### Omnichannel Execution

- **List all available channels.**
- **Are channels natively integrated?**
- **Describe the process around sending both transactional and promotional messages.**

- How do you integrate personalization in omnichannel campaigns?
- What are your capabilities for providing a unified view of the customer?
- What device-targeting capabilities are available?
- Describe your third-party integration connectivity.
- Do you have any AI capabilities that help with management or execution?
- How do you connect online and offline experiences?
- Do you have a 1:1 customer send time algorithm to increase engagement?
- Can you automatically determine which channel to select based on propensity to engage?
- Can you stop campaigns once in motion?
- How do you support multi-language campaigns?
- Can your system support international character sets?
- Do you support custom fonts?
- What content media store is available? Are there any storage restrictions?

## Email

- Describe your email builder functionality. Include any dynamic content functionality.
- Can users create their own templates within the platform? Please describe.
- How many personalization variables are available for dynamic content?
- Does your email platform support rich media?
- Describe any capability to preview campaigns in different email clients and devices prior to broadcast.
- Do you support adding products from a catalog directly into an email campaign?
- Can a user update multiple campaigns without changing each one individually?
- Can a user insert voucher personalization into email campaigns?

## Web

- Describe your capabilities for personalizing a customer’s experience on our website. What level of IT involvement is required to power this functionality?

- What website dynamic content options are available when targeting segments groups (e.g. pop-ups, ribbons, swapping generic website content for targeted content)?
- How can we use your targeting functionality to easily detect when website visitors are likely to exit their session and deliver dynamic content to encourage them to make a purchase?
- Please describe how your website target can also be used to exclude content (e.g. don't show email data capture to customers already part of the customer database etc.).
- How can we track customers' behavior on our website?

## Social Ads

- How do you support targeting customers on social media and Google channels?
- Do you have reporting about the audience's performance?
- How does the solution support using social ads within an automation program?
- How does your platform optimize spending on social media? Can your platform automatically add and remove contacts from Facebook Custom Audiences and Google Customer Match?

## Mobile Channels (SMS, Push, Mobile App)

- How does your system support SMS?
- Can you track customer behavior on the app?
- Can you send push/in-app notifications with personalized messages? Both automated and manual segmented push notifications are needed.
- Are you able to integrate SDK without compromising security integrity?
- Are you able to consume app data whether it's via FTP or real-time API?
- Can you integrate with more than one mobile app?

## Deliverability

Content needs to arrive where you're sending it — and you need to ask whether your vendor is equipped to help make sure that happens.

- **What kind of pre-flight checks do you offer?**
- **What guardrails (if any) are in place to ensure content is sent to the proper audience?**
- **List all partnership certifications, e.g. CSA, ReturnPath, etc.**
- **How do you measure deliverability performance?**
- **Are IP addresses dedicated or shared across clients?**
- **How do you guard clients against IP range blocking?**
- **How are blacklists monitored?**
- **Can you offer one-click unsubscribes?**
- **What is your management process for hard/soft bounces?**
- **What is your deliverability set and how do you assess this?**
- **How many IP addresses do you manage?**

## 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. Also look into features that support management of the customer lifecycle so you can boost lifetime value.

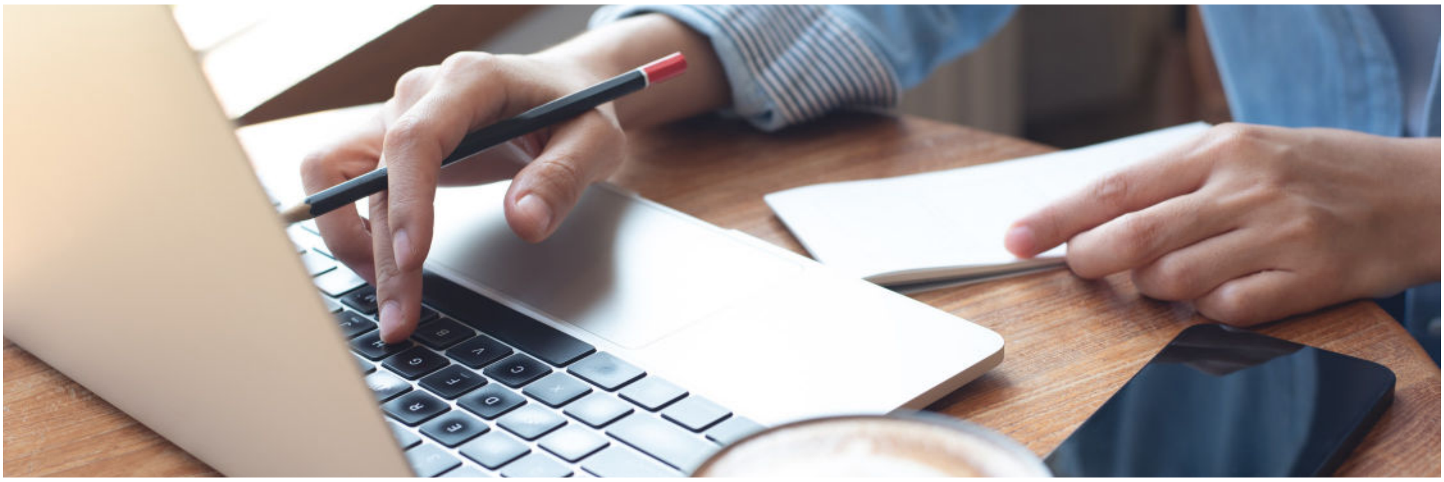
- **Describe or list the different types of automations that can be deployed.**
- **What events can trigger automated marketing actions?**
- **Can running automations be paused, edited, and resumed?**
- **What are your capabilities for automated A/B testing?**
- **Can a user preview dynamic personalization before a send?**
- **Do you offer pre-built, pre-populated automated campaigns?**
- **How easy is it for a user to create an automation/customer journey? Is coding required?**
- **How easy is it to change or optimize this automation once it's up and running?**
- **How much guidance does your system provide in campaign creation?**
- **What channels are available inside of a single automation?**
- **Is there a limit to the number of automated campaigns that can run at a time?**
- **How quickly can omnichannel automations be deployed?**
- **Are automations customizable based on individual customers' preferences and/or behaviors?**

- **What customer lifecycle options are available?**
- **What churn / defecting propensity models are available?**
- **What ROI and predictive spend models are available?**
- **What segmentation capabilities do you offer? Are segments dynamic or static?**
- **How many IP addresses do you manage?**

## Loyalty

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

- **Describe any loyalty module available directly within the platform.**
- **Do you support voucher management?**
- **Are you able to share coupons via mobile wallet?**
- **Do you work with any loyalty solution partners? Please list and describe partners.**
- **How accessible is loyalty data when it comes to triggering an action or connecting with your omnichannel strategy?**
- **Does the loyalty marketing platform have gamification functionality? Please describe.**
- **Describe reporting and analyzing capabilities for the loyalty module.**
- **How do you support tier-based loyalty?**
- **Can customer service award points and make other manual adjustments via a front-end solution?**



# Analytics and Support

## Analytics

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

- **Describe available standard reports (i.e. campaign-level, automation-level, customer lifecycle, and AI prediction accuracy reports).**
- **What types of dashboards are available?**
- **What options are available for custom reporting?**
- **Can we measure performance of individual links/assets within any given email?**
- **How are campaign metrics tied to business outcomes?**
- **Can reports be fed into automations?**
- **Do you offer vertical-specific reports?**
- **What methods do you have to connect platform data to third-party BI and Visualization tools?**
- **Does your system differentiate between individual (unique) clicks and the total volume (gross) of clicks?**

## Services and Support

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

- **Is onboarding outsourced or provided in-house?**
- **Do you offer recurring campaign services?**
- **Do you offer strategic consultancy?**

- **Do you offer consultancy around best practice for omnichannel designs?**
- **Is there a designated technical adoption team?**
- **What support channels (phone, web, etc.) are available?**
- **Is there unlimited 24/7 support available?**
- **What are your support SLAs?**
- **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

**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 your needs and the vendor landscape.

**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, or increasing revenue.

**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, and review reports from analysts like Gartner.

Invite about 6–8 vendors to your RFP and have a case for how each can help your business. Also, take some time to research the vendor landscape before the RFP process begins so you have a good understanding of it.

**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.

# 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, time to migrate can vary greatly. The more vendors you invite to the RFP, the more time you'll need for presentations and review.

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

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

**WARNING!** 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!

## A General Timeline for the RFP Process

# General RFP Management

**These final recommendations can help you manage your RFP successfully.**

**Make the RFP as long as it needs to be, but no longer.** The questionnaire should be only as long as you and other reviewers are willing to read, compare, and score the responses for each requirement from each vendor.

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

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

**Use a scorecard.** Get input from all key stakeholders to ensure an objective decision process. A spreadsheet can 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 reasons for the decision clear.

**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 — better martech means better outcomes, and ultimately more revenue!

Discover how SAP Emarsys can **empower your marketing and drive business outcomes for your brand.**

**Watch Our 3-minute Demo**

# About SAP Emarsys

SAP Emarsys is the customer engagement solution of Intelligent CX from SAP, empowering businesses to deliver personalized, AI-driven, omnichannel experiences. Built for scalability and extensibility, Intelligent CX from SAP integrates commerce, sales, service, marketing, and customer data, enabling businesses to exceed customer expectations with real-time, relevant engagement. From digitally native disruptors to global enterprises, SAP Emarsys helps bring out the best CX in every business by meeting customers where they are with the products, information, and experiences they need, exactly when and where they need them.

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