

klaviyo[™]

125+
questions
for your
marketing
platform RFP



If you've been around the block with onboarding new software for your business, you know an RFP is necessary to help you standardize evaluation criteria against a handful of marketing platform vendors. But how do you actually put one together to ensure you choose the right tool for your stack?

In order to make sure the product a vendor is offering aligns with your business goals, your RFP should generally consist of two parts:

01

Cover letter

(or the body) which frames the business need that is the focus of the RFP

02

Questions

which all bidders must answer in order to be considered for the job

Here's what should appear in each of those sections.

Cover letter: your business needs of the RFP

To start things off on the right foot with an RFP, you need to effectively communicate your business's story, needs around this particular project or purchase, and what you're looking for in your next marketing platform.

Here are some of the business critical sections you want to include:

01

Business overview

Include an overview of the company and provide background information.

02

Statement of purpose

Detail project goals, deliverables, and key milestones as well as an explanation of what your next marketing platform needs to accomplish and a breakdown of how it should contribute to your overarching business goals.

03

Scope of work

Address the issues or challenges you're facing with your current solution that you need the next platform to solve, and how it's impacting your business.

04

Anticipated roadblocks

Outline the key hurdles you expect to face during the process of adopting new ecommerce platform marketing technology.

05

Detailed selection criteria

Answer questions about how you'll make your final selection and the specific elements each vendor must include in their proposal to be considered.

06

Logistical parameters

Explain formatting guidelines, submission requirements and deadlines, targeted selection dates, and project timeline

07

Anything else

Build a section that explicitly asks each vendor to share recommendations and additional use cases that could impact their business, how they would implement them alongside the ones already outlined, and why.



Questions to ask on your ecommerce marketing platform RFP

Selecting a new marketing platform comes down to asking the right questions.

Consider these sample questions from a few suggested categories, as well as an example of a requirements section:



Requirements:

1. You must provide us with a test/sandbox environment as part of the RFP and RFP demo process so we can experience your technology and these capabilities for ourselves.
2. The test environment must allow me to input mock data to allow my team to effectively test the product.
3. You must provide a comprehensive pricing structure, unique to our business, detailing what's included in platform charges and what capabilities or features will require additional charges.
 - a. Please lay out all potential service line items (e.g. implementation costs, technical support hourly rates, customer support rates, premium support packages, premium deliverability packages, etc.)
4. You must provide a realistic timeline of implementation that details how quickly our business will be able to be fully onboard with your platform after and begin sending messages with live flows, IP warming, and end-to-end integrations.



Company overview

1. How many employees do you have and in what regions?
 - a. How does this compare to 12 and 24 months ago?
2. Where is your business headquartered?
3. Has your business raised rounds of funding?
4. How many customers do you have?
5. What percent of your customers work in eCommerce or Retail?
6. How many new features have shipped in the last 12 months?
 - a. What are the 2-3 most impactful ones you'd highlight?

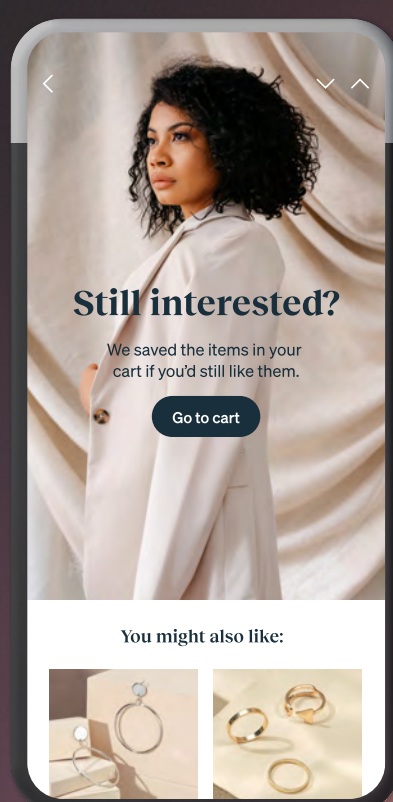




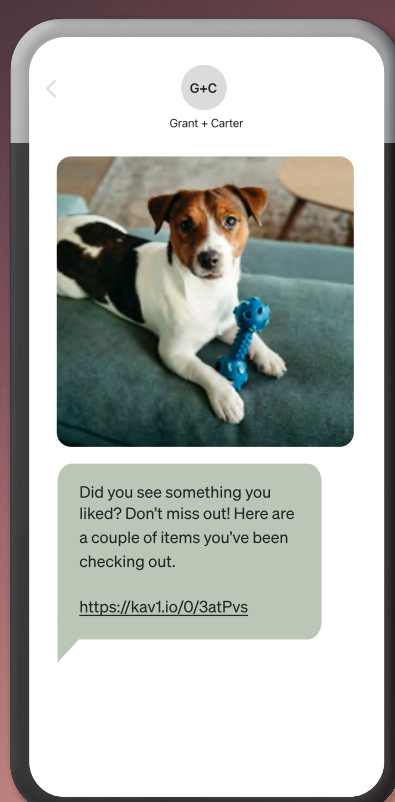
Marketing channels

1. **What tools does your system have** to create personalized emails?
2. Do you support transactional and mass email campaigns?
3. Do you provide guided email IP warming?
4. Are you able to integrate inbound SMS messages with {{insert helpdesk platform}}?
5. Do you offer short codes to SMS customers, and do you offer international SMS short codes?
6. Can I send SMS to my customers in different countries?
7. How do you ensure email and SMS deliverability and reliability?
8. How scalable is your SMS infrastructure to accommodate large message volume?
9. What measures do you have in place to ensure SMS compliance?
10. Do you provide two-way messaging?
 - a. In what countries?
 - b. Do you provide automated responses?
11. What is your pricing structure for SMS services?
 - a. Are carrier fees included?
 - b. Do you charge for inbound messages?
 - c. How do you charge for MMS?
12. How do you measure attribution?
 - a. Do you support multi-channel attribution for email and SMS?
 - b. Do you support custom attribution windows for email and SMS?
13. Do you support transactional as well as marketing SMS?
14. Do you provide pre-built automations for email and SMS?
 - a. Do you support back in stock automations for email and SMS?
 - b. Do you support price drop alerts for email and SMS?
15. What customer data is available for me to personalize SMS messages?
16. Are you able to have email, SMS, and mobile push messages in the same automation?
17. Are marketers able to create new triggered automations, edit an automation's logic splits/branches, and add new email/SMS/push messages without relying on developers?
18. Can you capture email and SMS opt-ins along with additional 1st party customer data over multiple steps in sign-up forms?
19. Do you offer product reviews?
 - a. How does the platform enable us to effectively handle the timing of review requests? Can I make sure requests don't conflict with other marketing messages?
 - b. How can I leverage reviews data across other marketing channels (email and SMS)?
 - c. How can I use reviews data for segmentation and personalization?

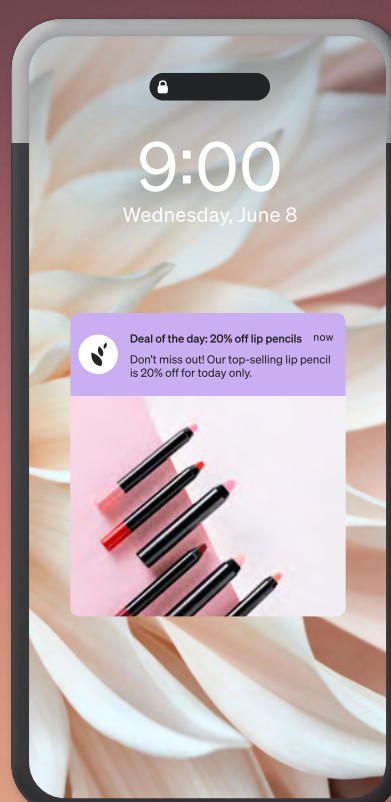
Email



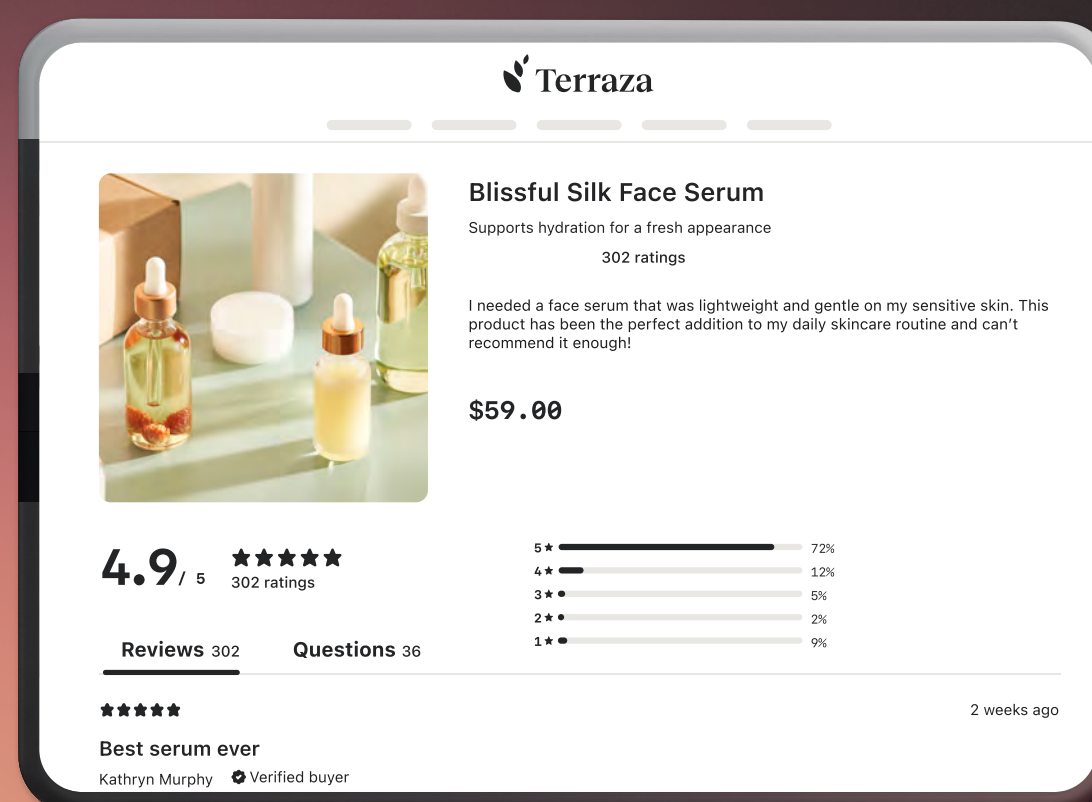
SMS



Mobile Push



Reviews





CDP

1. We described our current tech stack in our RFP overview. Which of these systems do you have out-of-box integrations to?
2. Are there any limits to the data types and/or data structure to what I can pass into your system?
3. How does your solution unify identities from offline, online, SMS, email, mobile, and 3rd party apps into a single profile?
4. How many custom properties and attributes can you store on a single user profile?
5. Does **your CDP** provide data storage?
 - a. Are there any hard limits in terms of data storage?
 - b. Does your CDP require a data warehouse to store data?
6. Do you have a limit on the number of criteria that can be used simultaneously in one segmentation?
7. Do you allow segmentation based on data from third-party integrations?
8. Do you have limits on how far back you can look for data in segmentation?
9. Can you ingest flat files at scale via SFTP or another solution?
10. Can you transform data to enforce data hygiene and standardization?
11. Do you have API access to power onsite personalization?
12. Can you sync data outbound in real-time via webhooks?
13. Can you sync data to your data warehouse? (if applicable)



Developer experience & tools

1. Does your **platform have APIs available** for integration?
2. What API standards do you follow (JSON:API, GraphQL, etc.)?
3. What programming languages do you support?
4. Do you offer pre-built client libraries for your APIs?



AI

1. What is your company perspective on AI?
2. What problems do you solve with AI and what results can I expect?
3. What's your AI roadmap and how are you planning to innovate AI capabilities for the future?
4. Would I have access to predictive analytics? If so, how accurate are they?
 - a. Can we predict a **customer's lifetime value**? If so, how can we use this data?
 - b. Can we predict the date a customer will purchase next? How can we use this data?
 - c. Can we predict a customer's likelihood to churn? How can we use this data?
5. How are you enabling testing and optimization in your today?
 - a. How does your current platform help us warm our sending infrastructure?
 - i. What guidance does your platform offer for IP warming?
 - b. How are you keeping customers up to date with the latest industry benchmarks?
 - i. How can we learn what metrics we need to improve?
 - c. Are we able to A/B test the following without any coding knowledge?
 - i. Content & display timing for sign-up forms
 - ii. Email subject line/content in campaigns and flows
 - iii. SMS content in campaigns and flows
 - iv. Timing of flows
 - d. Do you offer send time optimization? How does your model account for statistical significance?
6. Do you have generative AI capabilities to help create the following:
 - a. Segments
 - b. Email content & subject lines
 - c. SMS campaigns
 - d. Responses to reviews





Analytics & reporting

1. How do you help me understand what good engagement and purchase performance should be for my unique brand?
2. Who do you compare us to for your benchmarks and how is this determined?
3. Can you schedule reports or do they have to be run manually?
4. Can you track conversions across email, SMS and push?
5. Can you compare conversions broken out by channel?
6. Can you customize the attribution window for each marketing channel?
7. Can you track the growth of a segment over time?
8. Can you see what customers were added/dropped to a segment?
9. Do you have access to out-of-the-box models for customer behavior, like RFM?
10. How can you use insights from customer behavior models like, RFM, in segmentation and personalization?
11. Can you create customer journey funnels based on a customer's engagement across your tech stack and website?
12. Can you customize prediction windows for lifetime value?
13. Can you compare audiences (and their respective performance) against each other?
14. Can you create custom metrics for accurate reporting and attribution?



Security & infrastructure

1. Do you have baseline security certifications (privacy shield, trustE, SOC2, ISO 27001)?
2. What security policies are you able to provide?
 - a. Information Security Policy
 - b. Business Continuity Policy
 - c. Acceptable Use Policy
3. What controls do you have to restrict access to PII for users and for vendors?



Compliance, consent, and data privacy

1. How does your platform handle compliance?
2. What type of abuse prevention system do you have in place to protect your customers from potential fraud?
3. What safeguards are in place to ensure your customers are complying with data privacy laws, including international data privacy laws such as GDPR and CCPA?
4. What type of regulations do you enforce regarding the types of lists allowed to be uploaded to the platform?
5. What measures do you have in place to ensure customers are compliant on SMS? Do you enforce the following:
 - a. Collecting consent
 - b. Mobile terms of service
 - c. Proper disclosure language
 - d. Automatic consent checks
 - e. Remove recycled or inactive phone numbers
6. How does your organization stay up to date with changes in compliance, consent, and data privacy?



Deliverability

1. What steps are in place to ensure our IP address is properly warmed?
2. What anti-abuse and campaign monitoring measures do you have in place to protect your customers?
3. Is your organization able to assist customers who need to configure DMARC authentication policies?
4. What safeguards are in place to ensure your customers comply with Google and Yahoo sender requirements? Will customers be blocked from sending if they're not in compliance?
5. Are you able to support setting up branded sending domains?



Ecosystem

1. How many tech partners have a pre-built integration with your platform?
2. Do you have a partner program for marketing agencies and system integrators (SIs)?
3. How many agencies and SIs are in your partner program?
4. What are typical projects that are in scope for your agency partners?



Success & support

1. Do you provide onboarding services?
2. What is your average time-to-value (e.g. up-and-running)?
3. What resources are there for new users to learn your software?
4. Are there any additional costs for training resources?
5. How do you support your clients in deliverability?
6. What hours is your support available?

Power smarter digital relationships

An RFP is, by nature, a formalized approach to a complex, nuanced problem. So don't get caught up in the feature list checkbox. Instead, focus on the business impact tied to the success of the team and your revenues.

On a similar note: don't get stuck with a stagnant vendor that will fall behind you in a year or two. Make sure you choose a platform focused on innovation, that grows and scales with you, to ensure you're setting your business up for future success—so you don't have to go through the RFP process again.

Ready to explore a marketing platform that flexes as you scale?

Try Klaviyo today

Trademarks

