OPTIMIZING YOUR RFP

The Marketer’s Guide to choosing the right cross-channel provider
You’ve got a critical business decision to make—choosing a new email and cross-channel service provider who can deliver optimal results. In most large organizations, this means one thing...You have to write a Request for Proposal (RFP).

For today’s marketing leader, the RFP can be an exciting, yet laborious process. Exciting, because you’re exploring new possibilities for your business. Laborious, because, let’s face it, it takes a lot of time and effort. Yet for all your diligence, the RFP responses may not yield the information you need to make the right decision.

Most RFPs are driven by a spreadsheet or core questionnaire—essentially a checklist. RFPs of this type miss the intangibles that drive a successful vendor-client relationship. RFPs can also fail to elicit a vendor’s most important traits: passion, innovation, commitment to service and vision.

This e-book explores key factors to consider when choosing an email and cross-channel partner—factors that are unlikely to be uncovered in a questionnaire or revealed through a spreadsheet. Read on for five important tips on how to structure your RFP to glean the relevant insights you need to make an informed decision.
When selecting a cross-channel marketing provider, scalable technology is probably at the top of your list. While an important factor, it shouldn’t be all that’s driving your decision. As you plan your upcoming email programs, your strategy should include not only what you hope to get from a partner today, but how they will grow with you in the future.

Think about how email plays into your overall marketing strategy. Are you making the most of your email and cross-channel programs, or are you merely scraping by? How can you improve? One of the most common errors when evaluating a partner is the inability to be forward-thinking. To do this, you need to identify a vendor that has a clear vision for your business based on a carefully constructed understanding of your organization’s goals, the competitive landscape and industry intelligence.

Almost inevitably through the RFP process, the vendor’s questionnaire responses are based on the status quo and not on the vision of what they may be able to do for that prospect. While you want to standardize the process to easily compare vendors, forcing them to all look the same minimizes the true differentiators amongst your potential vendors.

Since the vendors don’t have enough detail from prospects around budget, volume and process, they ultimately give generic responses to avoid costly assumptions. They lack the opportunity to tell you what they can really do for you or make recommendations for process improvement. It’s like meeting with the architect who will build your home: Wouldn’t you want to see their blueprint rather than just the tools and materials they’ll use?
During the RFP process, be sure to provide vendors with your vision for the future and ask pointed questions as to how they can help you get there.

**IN YOUR RFP:**

- Ask the vendor to describe the service delivery methodology to help expand your business.
- Ask the vendor to share a case study of what they did for a previous client that really took that brand to the next level.
- See if the vendor can build a mini plan of suggestions for your brand. (But don’t expect anything too detailed from this: after all, they can’t go around giving free advice, and they have limited time.)
Emails sent vs. Emails in the inbox

Too often marketers succumb to the lure of big volume—the myth that vendors that send the most email are the ones most prepared to support enterprise programs. This is far from the truth. You really want to measure vendors by value, not volume. What percentage of emails sent are reaching the customer’s inbox? Are the emails relevant, delivering personal messages rather than batch and blast? Are customers engaging in your program?

Marketers who are just after alternative ways to improve opens and clicks aren’t doing enough. Engagement and conversions matter, which is why a strategic partner makes the difference. Platform capabilities can enable a strategy, but understanding how to use these capabilities most effectively to improve results is the gap that most often needs to be addressed. User guides can’t provide the same level of direction as a team of dedicated marketers when it comes to depth of customer knowledge or creative intelligence.
When crafting your RFP, consider the whole strategy. Ask yourself: Is the lowest CPM really the best value if subscribers aren’t engaging with or even reading your email? Find out more about deliverability and engagement metrics, not just volume. Learn what the email and cross-channel provider is capable of doing to build a fully thought-out and implemented strategy.

IN YOUR RFP, ASK:

- What engagement features, like machine learning and kinetic effects, can the vendor provide? How can the vendor help you implement them?
- What are the vendor’s deliverability metrics?
- What has the vendor done for past clients to improve their deliverability and engagement metrics?
Marketing technology companies are moving beyond creating a platform dedicated to only one capability. Many platforms can now easily manage email, SMS, mobile and much more in a single interface. But functionality falls short if the prospect lacks a true cross-channel strategy, and if the vendor is ill-equipped to build that strategy. In today’s cross-channel world, consumers expect a cohesive experience in all channels, not independent messages in each channel. Few vendors are able to keep it all in house, which forces marketers to choose multiple partners or be content with a division of labor and support between product and service. The result is often a fragmented strategy and difficulty recognizing maximum value from these relationships.

You want to know that a vendor can not only deliver the tools, but also partner with your team to plan, implement and even help manage an ongoing strategy that takes full advantage of the available functionality. Otherwise, you’re wasting your investment. Think about it this way: Someone could hand you all the pieces to a bike and wish you luck in figuring out how to ride it. Or they could help you build the bike and teach you to ride. Being able to define this cross-channel plan is important, but the ability to identify an individual across the channels and device is imperative. Having the customer insight and analytics is the key to accurately deliver messages to the customers you want to reach.

To do this, you must do more than detect their device, email address or cookies. Why isn’t that enough? Devices change or have multiple users, individuals have multiple email addresses, and cookies expire. You need to identify real people to deliver your message, and you need the right vendor to get you there.

A true partner will help you understand how all the channels cooperate and orchestrate in a way that elevates your strategy. They’ll work with the heads of your email, mobile, digital and social departments to develop a universal message and utilize the right data to actually deliver on that strategy. And they’ll be able to bring together creative, agency, strategy and data efficiently and cohesively.
During the RFP process, find out what the email and cross-channel provider delivers in addition to the platform. Learn about the support services they offer and how the vendor can truly become part of your team, not someone who forgets about you after you purchase their tech.

**IN YOUR RFP, ASK:**

- What additional services, like creative and strategy, can the vendor provide to improve your email marketing campaigns?
- How does the vendor identify customer activity across channels?
Closing the personalization gap

It’s been your goal every year—improve personalization and deliver more relevant content. It’s probably fair to say technology is not what’s holding you back. After all, wasn’t personalization among your top considerations the last time you selected an email and/or a cross-channel provider? What you really need to understand is how the vendor you choose can help you close the gap to deliver more personalized experiences to the customer’s inbox.

Many email and cross-channel providers can provide relevant messaging, narrowing down messaging into smaller segments of perhaps 1,000 consumers. But to drive a better customer experience, you need to reach your consumers on a 1:1 scale, not 1:1000. Truly personalized messages go beyond narrowing down customers by demographic. They can personalize every component of the messaging experience, including content, offer, timing, location, device, recommendations and subject line.

Delivering such experiences is not an easy task. You need deep customer knowledge through robust data sources, as well as creative, strategic and operational readiness. You also need to know the solution can scale to deliver millions of unique messages inside a single campaign.

Whether or not your brand can deliver a personalized campaign isn’t just about the platform—it’s about the bandwidth, strategy and resources that lead to a personalized campaign. Ensure that the email and cross-channel provider you’re considering has the resources to fill the personalization gap, not just a fancy platform.
When developing your RFP, remember to ask not just about the tools that email and cross-channel provider has to deliver better personalization, but also whether they have the implementation experience, internal process and strategic vision to actually put better personalization into action.

**IN YOUR RFP:**

- Ask for case studies and examples from the vendor’s clients about instances where they improved the client’s personalization strategy.
- Have the vendor describe their team, providing insight into their alignment and individual functions.
- Find out if their team provides support and strategy specifically for personalization efforts.
Transparency is essential

Choosing an email and cross-channel provider is an important decision for your organization, but it’s a two-way street. As much as you need to know about potential vendors, they also need to have an accurate picture of your organization to give you the most relevant feedback. Being transparent helps email and cross-channel providers offer well-considered responses that provide vision and add value to your efforts.

It makes sense to give candidates thorough background on your company before you ask them for a response. If you have market or audience research that could come into play, share it. If you have particular challenges you want to solve, provide a comprehensive overview. Also be sure to clearly explain the purpose for the RFP, setting expectations from the beginning. The more information your potential partners have, the more thoughtful and accurate their responses will be.
When developing your RFP, dedicate adequate time and effort to share all the information your potential vendors need so they can put their best foot forward.

IN YOUR RFP:

☑ Be honest about what your organization is looking for in a cross-channel provider.

☑ Consider the information the vendor must know about you in order to truly understand your needs.

☑ Thoughtfully craft your RFP questions to obtain the information you need to make a smart decision.
As your single source for creative, agency services, strategy and analytics, we can ensure that your marketing plan can span every channel in an integrated way. And our proprietary data sources and decades of experience in data management mean we can actually act on our recommendations and deliver unprecedented results.

Our industry-leading Agility Harmony platform has all the capabilities you need to deliver real-time, personalized messages across email, SMS and more. And while the platform speaks for itself, our ability to solve real business problems—and deliver real results for our clients—is the Epsilon difference.

Our success comes from the dedication of our people, the investment we make in your business and the deep-seated expertise we draw from all areas of our organization. These are real advantages, and not the kind you can track in a spreadsheet.

To learn more about Epsilon’s cross-channel capabilities, visit epsilon.com/email or call 800 309 0505 to learn more.